Product Documentation
SAP Cloud for Customer November 2013

PUBLIC

SAP Cloud for Customer

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1 About SAP Cloud for Customer

SAP Cloud for Customer can be purchased along with one or more of the following separate products:

- SAP Cloud for Sales
- SAP Cloud for Service
- SAP Cloud for Social Engagement

SAP Cloud for Customer Feature Matrix

The following provides an overview of which features are available within each product.

SAP Cloud for Customer Feature Matrix

Product	Included Work Centers	Included Work Center Views
SAP Cloud for Customer	Home Page	ALL The home page is available to all users and does not require a specific work center assignment. If you make changes to the home page in the browser, or in SAP Customer Insight on the iPad, the changes are reflected in both places.
	Feed	ALL If you plan to use SAP Jam Feed, you must have a separate SAP Jam license.
	Activities	ALL E-mail blasts are only supported in SAP Cloud for Sales.
	Customers	ALL • Individual customers are only supported in SAP Cloud for Service and SAP Cloud for Social Engagement. • The social media features of SAP Cloud for Social Engagement are only supported for individual customers. Target Groups are only supported in SAP Cloud for Sales.
	People	ALL You must have a separate SAP Jam license to use SAP Jam groups.
	Products	ALL • Price list, discount list, and product lists features are only supported in SAP Cloud for Sales. • Registered products and warranties are only supported in SAP Cloud for Service and SAP Cloud for Social Engagement.
	Library	
	Data Privacy Management	ALL

Product	Included Work Centers	Included Work Center Views
SAP Cloud for Sales	Includes SAP Cloud for Customer as well as the following:	
	Account Hierarchy	
	Activity Planner	ALL
	Administrator	ALL Except: Service and Social Settings
	Analysis	ALL Except: Service Overview
	Business Analytics	ALL
	Business Configuration	ALL
	Business Partners	ALL
	Competitors	ALL
	Data Integration	ALL
	iPad Offline	
	Marketing	ALL
	Mass Data Maintenance	
	Partners	ALL
	Sales	ALL
	Service Control Center	ALL
	Surveys	
	Tickets	
	Visits	ALL

Product	Included Work Centers	Included Work Center Views
SAP Cloud for Service	Includes SAP Cloud for Customer as well as the following:	
	Account Hierarchy	
	Activity Planner	ALL
	Administrator	ALL **Except**: Sales and Marketing Settings
	Analysis	**Only**: • Service Overview • Dashboard • Executive • Manager • Performance • Reports
	Business Analytics	ALL
	Business Configuration	ALL
	Business Partners	ALL
	Customer Service	ALL **Except**: Social Media Messages
	Data Integration	ALL
	iPad Offline	
	Mass Data Maintenance	
	Service Control Center	ALL
	Surveys	

Product	Included Work Centers	Included Work Center Views
SAP Cloud for Social Engagement	Includes SAP Cloud for Customer as well as the following:	
	Account Hierarchy	
	Activity Planner	ALL
	Administrator	ALL **Except**: Sales and Marketing Settings
	Analysis	Only: • Service Overview • Dashboard • Executive • Manager • Performance • Reports
	Business Analytics	ALL
	Business Configuration	ALL
	Business Partners	ALL
	Customer Service	ALL
	Data Integration	ALL
	iPad Offline	
	Mass Data Maintenance	
	Service Control Center	ALL
	Surveys	

SAP Cloud for Customer Library

Depending on the individual products to which you have subscribed, you may have access to one or more of these feature sets. If you select the SAP Cloud for Customer Library link from the Help Center, you have access to the entire documentation library for all of these products.

This library is divided into the following sections:

- General Features
  These features are available to you regardless of which product you have purchased.
- Sales and Marketing Features
  These features are only available to you if you have subscribed to SAP Cloud for Sales.
- Service Features
  These features are only available to you if you have subscribed to SAP Cloud for Service.
- Social Features
  These features are only available to you if you have subscribed to SAP Cloud for Social Engagement.

The *Administrator Guide* includes the following topics covering the tasks required to set up and configure each of the associated products:

- Getting Started for SAP Cloud for Sales Administrators
- Getting Started for SAP Cloud for Service Administrators
- Getting Started for SAP Cloud for Social Engagement Administrators

Even though the documentation may describe a specific feature, you will not be able to access or use this feature unless you have subscribed to the specific product to which it pertains as outlined in the feature matrix above.

User Interface Layout and Navigation

For more information on the UI layout and navigation of SAP Cloud for Customer, see Layout and Navigation.

System and Software Requirements

See: SAP Cloud for Customer System and Software Requirements

Copyright and Trademarks

2 What's New in SAP Cloud for Customer

This document provides information about what's new and what's changed for the sales, marketing, service, and social engagement features of SAP Cloud for Customer.

New and Changed Features

General Features

What's New

- SAP Cloud for Customer for iPad
  - Retail Execution is now supported in offline mode. This allows you to complete visit actions such as check-in and check-out, edit visit information, complete surveys and tasks and create follow-up items such as sales quotes, service tickets and opportunities. While in offline mode you can also create contacts and tasks and add a product list to sales quotes.
  - iOS 7 is now supported by SAP Cloud for Customer for iPad.
- Easy Search for Phone Numbers and E-Mail Addresses
  You can search for a phone or e-mail using wildcard characters from the advanced filter at the top of a list of accounts, contacts, individuals, partners, or partner contacts, where applicable. You can also search for a phone number using text.
  This search is conducted on both the primary and secondary phone numbers and e-mail addresses. Choose the search result to go into the details to see secondary numbers and addresses.
- Surveys
  Surveys have been enhanced with the following features:
  - You can now fill out surveys for product categories, as well as individual products. Note: surveys for product categories is only available when accessing the solution from a web browser.
  - Surveys can pre-populate answers based on the answers given for the previous survey. Enable this option when you create a survey by selecting the *Previous Answers* checkbox.
  - You can now use scoring for multiple-choice questions. You can then use the scoring for reporting.
  - You can view survey results associated with an account, product or competitor product by choosing the *Survey Results* tab from the relevant details screen, provided that you have personalized the screen to make this tab visible.

    > You can only view survey results for products and competitor products whose status is *Complete*.

    For more information, see Surveys [page 88].
- Workflows for Tickets
  Under *Activity Planner* > *Routing Rules*, you can now automatically assign an activity plan (which can include tasks and surveys) to a ticket, based on the ticket attributes.
- Interactive Dashboards
  Interactive dashboards are now available when accessing your solution with a web browser as well as on SAP Customer Insight for iPad.

What's Changed

- Name and Address Changes
  Now when you change a customer or contact name or address, any existing documents associated with that customer or contact, like opportunities or tickets, are updated to reflect the changes.
- Inviting People to Groups
  You can invite people easily when creating a new group, provided that your administrator has enabled groups through SAP Jam integration. Select *Invite Team* or *Invite Contacts* to automatically populate the related boxes when creating a new group.

Sales Features

What's New

- Tours
  You can now organize multiple account visits into a tour. Tours are useful if you want to plan the sequence and timing of multiple visits in one day, one week, or even an entire month.
- Sales Leads
  From the *Sales Leads* worklist, you can now choose *Actions* > *Assign Selected Leads Using Rules* to re-assign sales leads that are not of interest to you. In response, the solution routes these leads in accordance with the lead assignment rules defined by your administrator.
- Opportunities
  - Actions for opportunities are now supported in the worklist.
  - You can now choose a new tab, *Related Opportunities*, to identify other opportunities that are related to the current opportunity. Provided that you have personalized the screen to make this tab visible, you can add an existing opportunity to associate it with the current opportunity, or create a new associated opportunity.

    > If you create a new opportunity in this tab, then the solution copies the field entries of the existing opportunity into the new opportunity, so that you can modify the entries before saving.

  - You can now delete opportunities from the worklist, provided that your administrator has granted you the appropriate authorizations.

What's Changed

- Account Owners
  If you have a solution where territory management is enabled, when you create a new account, you are no longer the default account owner. You can manually assign yourself or another person as the account owner. If you input a territory when creating an account, then the associated territory owner will be assigned to the account. The territory owner and account owner are no longer related.
- Sales Data in Accounts
  If your solution is not integrated with SAP ERP or SAP CRM, then you can now create, edit, or delete sales data from the account details, under the *Sales Data* tab, provided that you have personalized the screen to make this tab visible.
- Appointments
  From the details screen of an appointment, you now choose *Actions* > *Generate Summary* to generate a summary. (Previously, this option appeared under *Actions* > *Generate Visit Report*.)
- Download Your Contacts and Account Information into Microsoft Outlook®
  You can synchronize your account and contact information from the SAP cloud solution into Microsoft Outlook.
- Multiple Territories to an Account
  If your administrator has enabled multiple territories, you must select a territory when creating an opportunity, sales lead, sales quote, or activity.

- Override Territory
  If your administrator has enabled territory management, but not the assignment of multiple territories to an account, and if you deselect *Override Territory* from the account details header, then the solution will automatically derive the territory, based on any existing rules. To keep a new territory assignment, choose *Save*.

Marketing Features

What's New

- Marketing Leads
  - You can select the new *Use Existing Account* option, provided that you have personalized the solution to make it visible, to assign existing accounts and contacts to new marketing leads as you create them. To do so, select this option, then specify the appropriate account and contact for the new marketing lead, then save it.

    > Marketing leads that are created with this option can only be converted to opportunities, because an account and contact are already associated with them.

  - The *Involved Parties* tab is now displayed for marketing leads that have been created with the *Use Existing Account* option.
  - From the *Marketing Leads* worklist, you can now choose *Actions* > *Assign Selected Leads Using Rules* to re-assign marketing leads that are not of interest to you. In response, the solution routes these leads in accordance with the lead assignment rules defined by your administrator.
  - If your solution is scoped to check for duplicate accounts and contacts, then you can now see potential duplicates within the *Conversion* tab of the marketing lead details.

    > If the marketing lead has been converted to another item or created with the *Use Existing Account* option, then potential duplicates are not displayed within the *Conversion* tab.

  - You can now delete certain marketing leads from the worklist, provided that your administrator has granted you the appropriate authorizations.

    > Even if you possess these authorizations, you cannot delete marketing leads that have been converted to sales leads or to accounts and contacts. You also cannot delete marketing leads that have been created with the *Use Existing Account* option.

Service Features

What's New

- Work Order Management
  The processes involved in work order management are now supported through the introduction of the following features:
  - Work orders are created when an agent releases a ticket to the work order status. The work order is then available in the *Work Orders* tab and can be assigned to a service technician or team for processing. For more information, see Work Orders [page 159].
  - Surveys and tasks may be assigned to tickets and work orders automatically based on the rules defined by your administrator. You can also choose to manually add them from existing activity plans.
  - Service technicians can work in SAP Cloud for Customer for iPad to plan and process work orders while on site.
- Surveys
  Survey features are now supported for tickets. For more information, see Surveys [page 88].

- Third-Party Reported Tickets
  When you create a manual ticket, you can now indicate that the issue is being reported by a customer on behalf of a customer's customer, both of which are accounts in the solution.
- Involved Parties
  The agent workspace now includes a tab for all involved parties related to a ticket.
- Ticket Routing
  Tickets created manually are now routed according to the rules defined by your administrator.
- Enhancements to Individual Customers
  When creating a new individual customer, you can now add a mobile number, fax number, and address, provided that you have personalized the area to make these fields visible. You can also add multiple addresses, e-mail addresses, and mobile numbers to an individual customer from the details screen, under the *Addresses* tab.

What's Changed

- E-Mail Responses
  - Agents can now change the *From* e-mail address when responding to tickets.
  - E-mail tickets are now associated with the e-mail address the customer used to send their message, regardless of whether that e-mail address is his or her primary e-mail address on record.
- Adding Notes to Completed Tickets
  You can now add internal notes to a completed ticket.

How-To Videos

Additional training videos have been published. To watch them, see How-To Videos [page 18].

3 VIDEO: What's New

Video

What's New in SAP Cloud for Customer (2m 1s)

Find out about the latest features delivered with SAP Cloud for Customer.

4 How-To Videos

To watch a video, choose a link below. The videos open in a new browser window.

The following videos are narrated in English. Subtitles are available for some videos.

General Features

Title	Duration	Description
What's New in SAP Cloud for Customer	2m 1s	Find out about the latest features delivered with SAP Cloud for Customer.
Using Feed	3m 24s	Find out where feed updates come from, how to post and comment on feed updates, and where to find private updates.
Using the Toolbar and Panes	3m 35s	Find out how to use the toolbar and panes to search for information and post updates.
Using the Shelf, Flags, and Favorites	2m 50s	Find out about the shelf, how flags and favorites are connected to it, and how to use it to keep important items at your fingertips.
Creating and Editing Items	2m 40s	Find out the different ways you can create items.
Managing Your Profile	Coming soon	Find out how to manage your personal information and feed updates with your profile.
Changing Your Feed Settings	2m 49s	Find out how to adjust which updates you receive from the source you're following and how to automatically flag and tag incoming updates.
Customizing Your Personal Settings	3m 43s	Find out how to change your general system settings and how to personalize the content on screens.
Organizing Items with Tags	2m 55s	Find out how to use tags to organize and quickly find items.
Welcome to Your Home Page	2m 52s	Find out how to personalize your home page.
Using the Reports Quick Filter	4m 42s	Find out how to use the quick filter for reports to close more deals.
Working with Report Details	4m 37s	Find out how to modify a report in the Web Browser view and how to add it to your dashboard.
Enabling Chat	7m 23s	**For Administrators:** find out how to enable chat using SnapEngage so that your service agents can chat with customers.
Assigning User Access Rights by Roles	3m 40s	**For Administrators:** find out how to create roles that you can assign to users for easier maintenance of user access rights.
Adapting the User Interface	5m 18s	**For Administrators:** find out how to adapt the user interface by renaming and reordering fields, as well as how to determine which fields are visible.

Title	Duration	Description
Adding Custom Fields to Reports	4m 21s	**For Administrators:** find out how to add custom fields to objects in the solution and then add those fields to reports.
Setting Up Data Access Restrictions	5m 23s	**For Administrators:** find out how to use access restrictions to limit employees' access to data in your solution.

Social Media Features

Title	Duration	Description
Start Here for SAP Cloud for Social Engagement	7m 22s	Find out the basic information you need to get working on tickets in SAP Cloud for Social Engagement.
Configuring an SAP Social Media Analytics Web Service	4m 17s	**For Administrators:** find out how to create a mashup web service and configure the API for SAP Social Media Analytics by NetBase.

Sales Features

Title	Duration	Description
Start Here for SAP Cloud for Sales	2m 56s	Find out how to walk through the sales cycle: starting with an assigned lead, converting it to an opportunity, and finally reporting on the closed deal.
Working with Leads	4m 48s	Find out how to create and qualify leads, and how to convert leads to other items — such as opportunities — to drive sales activity.
SAP Customer Insight for iPad®	4m 11s	Find out how to work with tiles, view report details, and personalize your dashboard with SAP Customer Insight.
Creating Items on the iPad App	4m 46s	Find out how to create and edit items on SAP Cloud for Customer for iPad, including how to convert a lead to an opportunity.
Navigation and Feed for the iPad App	4m 38s	Find out how to navigate to different views and use the feed and toolbars in SAP Cloud for Customer for iPad.
Creating Sales Quotes	4m 21s	Find out how to create a sales quote.
Working with iPad Offline Mode	3m 58s	Find out how to use SAP Cloud for Customer for iPad in offline mode.
Managing E-Mail Campaigns	3m 12s	Find out how to create and manage direct e-mail marketing campaigns.
Adding Activities with Sales Activity Advisor	2m 40s	**For Administrators:** find out how to add best practices and activities to help your sales team win more deals.
Setting Up Sales Territories	7m 23s	**For Administrators:** find out how to set up sales territories.

Service Features

Title	Duration	Description
Start Here for SAP Cloud for Service	8m 8s	Find out how to use SAP Cloud for Service.

Title	Duration	Description
Processing Tickets	4m 12s	Find out about the tools in the Workspace and in the Queue and Tickets list that help you to complete tickets.
Prioritizing Tickets with Service Level Agreements	3m 35s	For Administrators: find out how to use Service Level Agreements to prioritize tickets.
Creating a Knowledge Base Mashup	5m 40s	For Administrators: find out how to create a data mashup to connect the articles in your external knowledge base to your solution.
Defining Routing Rules for Tickets	4m 46s	For Administrators: find out how to define routing rules for tickets.
Setting Up Service Teams	5m 12s	For Administrators: find out how to set up service teams.
Setting Up E-Mail Channels	6m 15s	For Administrators: find out how to set up e-mail channels in your solution.
Support Portal Administration	5m 4s	For Administrators: find out how to administer support portals for your customers.

Retail Features

Title	Duration	Description
Start Here for Retail Execution	4m 45s	Find out all about retail execution, including planning a visit, recording site information with surveys, and working in offline mode at the account location.

5 General Features

5.1 HTML5

5.1.1 HTML5 in SAP Cloud for Sales

Please note that this document is relevant only for HTML5-based screens. Either the described function is available only in HTML5, or its HTML5 version differs from the Microsoft Silverlight® version. To use this function in the Microsoft Silverlight client, please log on to the Microsoft Silverlight-based screen and follow the instructions in the corresponding help document.

Your solution is HTML5-based if the system URL contains `/HTML5`. Your solution is Microsoft-Silverlight-based if a *Silverlight* pop-up window appears when you right-click anywhere on the screen.

SAP Cloud for Sales uses HTML5 technology.

Prerequisite

Your administrator has set the default client to HTML5.

Business Background

HTML5 is the new standard for internet technology. It has open standards and runs on multiple platforms including mobile-device platforms. Using HTML5 in SAP Cloud for Sales creates a plug-and-play solution, meaning that it is not necessary to install additional software on each user's machine.

Tasks

Use Interactive Dashboards

HTML5 has enabled some additional features in analytics. For more information, see Using Interactive Dashboards [page 104].

Personalize Your Screens

Each user can personalize their own screen to reflect the way they like to work.

- Home page

  For information about personalizing your home page, see Welcome to Your Home Page (3m 40s).

- All other screens

  You cannot personalize your background image in HTML5.

1. Start personalization.
   Stripes appear in the title bar of the solution to indicate personalization mode.
2. Hover on the area you want to change.
   For information about adding a mashup to a screen, see Personalize a Mashup.
3. Select one of the options that appears in the hover tooltip and make your change.
4. End personalization.
   The stripes disappear from the title bar.

For more information about personalizing HTML5 screens, see About Personalization.

Use Updated Elements

Compared to the Microsoft Silverlight® client, some elements of the screen appear and work differently in HTML5. The following are a few examples:

- Tabs
  To open multiple items at the same time, such as an account, opportunity, and lead, right-click the item's link and choose *Open link in new tab*. You can use the tabs to navigate between the open objects.
- Inline editing

  > In the HTML5 version, the editor opens in display mode. Click *Edit* to make changes to the entries in the fields. Ensure that you have saved your changes by clicking *Save*. In the Silverlight version, inline editing is available. This means that you need to double-click on a field to edit its content. The *Save* button only appears when you have made a change.

  For more information about adding or changing fields, see Extension Fields Quick Guide.
- Reporting an incident
  For more information, see Reporting an Incident [page 22].

5.1.2 Report an Incident

Overview

> Please note that this document is relevant only for HTML5-based screens. Either the described function is available only in HTML5, or its HTML5 version differs from the Microsoft Silverlight® version. To use this function in the Microsoft Silverlight client, please log on to the Microsoft Silverlight-based screen and follow the instructions in the corresponding help document.
>
> Your solution is HTML5-based if the system URL contains `/HTML5`. Your solution is Microsoft-Silverlight-based if a *Silverlight* pop-up window appears when you right-click anywhere on the screen.

If you encounter a problem in the application, you can search existing knowledge bases for a solution. If no solution is available, you can report an incident to your administrator to request help in solving the problem. The system collects context data, such as system information, a screenshot of the screen from which the incident was reported, and relevant business data, and attaches it to the incident. This data gives information about the system at the time at which the incident occurred and helps your provider to better understand the problem if your administrator cannot solve the incident. The context data is only useful if you report the incident from the screen on which the problem occurred since it includes information that is specific to this screen. Therefore, it is important that you always report application-related incidents from the screen on which they occur. To do so, go to *Help* > *Report an Incident*.

> If your administrator forwards the incident to SAP and SAP's root cause analysis shows that the incident results from a partner product which your company has licensed, SAP may forward this incident, including all corresponding context data, to the support organization of the partner responsible.

If you encounter a problem when exporting or uploading business data from or to Microsoft Excel®, you can also access the *Report Incident* screen from the SAP Add-in tab by clicking *Help* > *Report an Incident*.

Prerequisites

You have configured your computer settings correctly by choosing *Check My Computer Settings* from the logon screen.

Process Flow

1. To reach the *Report an Incident* screen, click *Help* > *Report an Incident*.
2. Under *Show us where the issue is* you can annotate a screenshot of where you were working to better illustrate your problem. You can highlight areas of the screenshot or add comments by inserting a callout. This helps your administrator to better understand the problem and solve your incident more quickly.
   If the screenshot is not relevant, you can:
   - Close the *Report an Incident* screen without saving the changes, then navigate to the screen on which the problem occurred and report an incident from there to ensure that a relevant screenshot is attached to the incident.
   - Deselect the *Attach Screen* checkbox. The screenshot will not be included and you can continue reporting the incident.

   Optional: You can provide screenshots or other relevant information as attachments to help your administrator understand your problem quickly. To add an attachment, click *Attach File* .
3. Under *Tell us what's wrong*, specify the information your administrator requires to solve the incident:
   - In the *Subject* field, enter a brief description of the problem.
   - Enter a detailed description of the problem that includes the following information:
     - The events or actions that led to the problem, that is, details how to reproduce the problem
     - The results you expected (for example, different values or a more detailed error message)
     - If you are not reporting the incident from the *Help Center*, also include the following information in your description:
       - Your user name
       - The work center and view in which the issue occurred
       - The documents or object IDs in which the issue occurred
       - The system behavior (for example, the error message displayed)

   > For security reasons, **never** include your password anywhere in the incident.

   > If you are an administrator and you want to send the incident directly to your provider, select the *Forward to Provider* checkbox.
4. Under *How serious is it?*, select the priority of your incident based on the following information:

Business Impact for Incident Priorities

Business Impact	Priority
Critical business processes are affected and crucial tasks cannot be carried out. The incident requires immediate attention because it could result in business downtime for the organization. Security-related incidents must always be assigned this priority. If you want to report an incident with this priority to SAP outside of your standard local business hours, enter the incident information in English to ensure that it can be processed by after hours support, which is available 24 hours a day, 7 days a week.	*Can't work*
Business processes are affected, but the incident has only a minor impact on business productivity.	*I am concerned*
The issue has little or no effect on business processes.	*Minor thing*

5. To save your entries and submit the incident to your administrator, click Submit.

The incident is submitted to your administrator, who either solves your problem directly or forwards the incident to the provider for further analysis.

For more information, see Working with Incidents.

5.2 Changing Your Profile Picture

Your profile gives you tools to manage your personal information. To open your profile, in the topmost menu bar, choose *Your Name* > *Profile*.

Tasks

Changing Your Profile Picture

1. From your profile, choose *Actions* > *Change Image*.
2. Browse and select the image you want to upload.
3. Save your entries.
   The image that you selected appears as your profile picture.

5.3 VIDEO: Customizing Your Personal Settings

Video

Customizing Your Personal Settings (3m 45s)

Find out how to change your general system settings and how to personalize the content on screens.

5.4 VIDEO: Creating and Editing Items

Video

Creating and Editing Items (2m 40s)

Find out the different ways you can create items.

5.5 Feed

5.5.1 VIDEO: Changing Your Feed Settings

Video

Changing Your Feed Settings (2m 49s)

Find out how to adjust which updates you receive from the source you're following and how to automatically flag and tag incoming updates.

5.5.2 About the Feed

The feed allows you to quickly communicate and collaborate with your network. The feed is where you post updates to your network and receive updates from your feed sources — the information and people you need to complete your work. In the feed, you can post feed updates (using shorthand), comment on feed updates, and delete feed updates. You can also manage your feed sources and feed settings. As with other items, you can also search feed updates, use filters to view only certain types of updates, and flag or tag feed updates, or add them to your favorites.

Tasks

Posting Feed Updates

To post a feed update, enter a text of up to 500 characters in length, then choose *Post*.

Once you post an update, it appears in your feed. If other employees are following either you or the item you updated, then your update also appears in their feed. Employees you mention in your update (with the shorthand `@`) also automatically see the update in their feed, even if they are not following you or — when you mention them while posting an update from an item — the associated item.

Using Shorthand in Feed Updates

Within feed updates, you can use shorthand to tag items or mention people, or send private updates, as described below.

Shorthand	Description
`@`	To tag an item or mention a person in your update, enter an at sign (`@`) plus the item or person name. For example, enter `@AccountABC` to tag the account named *AccountABC*, or enter `@Frank Friedman` to mention a customer named Frank Friedman. Items that you tag in an update appear in the feed as links that can be opened for viewing or editing. Employees who receive your update can only open tagged items that they are already following.
`*`	To send a private update to an employee, enter an asterisk (`*`) plus the employee name, followed by the private update. For example, to send the private update “Good work!” to the employee Maria Smith, enter `*Maria Smith Good work!` , then choose *Post*.

After you enter shorthand and two characters of the item or person — for example, `@Ac`, `@Fr` or `*Ma`— an automatic search is performed, comparing your entry with existing items or people, and allowing you to select the correct one.

> If a business document has a single-digit number, enter an asterisk after the number, for example `5*`.

Commenting on Feed Updates

To comment on a feed update, choose *Comment* within the update. Enter your comment, then choose *Post*.

Within the comment of a feed update, you can also use the shorthand `@` to tag items or mention people. If you tag an item in the comment, then your comment also appears in the feed of that item.

> You cannot use the shorthand `*` to send private comments to other employees.

Deleting Feed Updates

To delete a feed update, choose *Delete* within the update line.

In response, the update and its comments will be removed from your feed. If you delete a feed update of your own, then the update and its comments will be removed both from your feed and from the feed of your followers.

> Certain feed updates cannot be deleted.

Following Feed Sources

If you are authorized to receive updates from an item that you have chosen to follow, then updates about that item automatically begin to appear in your feed. If you are not authorized, then a follow request is sent to the person responsible for approval.

If you stop following an item or person, then the source is removed from your feed, and updates for that item or person no longer appear there.

Managing Feed Sources

To manage your feed sources, choose *Feed* > *Feed Sources* , where you can see a list of the sources that you are currently following. For each source that you follow, you can specify the source events that will trigger an update. To do so, select a source from the list, then choose *Manage Source Events*.

On this screen, you can specify, for example, that a status change to an account that you are following will trigger an update in your feed. You can also specify whether the source event will be included in e-mail digests, or flagged.

For more information about source events, see Feed Events [page 27].

Managing Feed Settings

To manage your feed settings, choose *Feed* > *Feed Settings*, where you can determine the following:

- How your follow requests are accepted
  To specify that all follow requests be accepted automatically, choose *Automatically accept requests to follow*.
- Whether e-mail digests for feed updates are sent
  To receive periodic summaries of all feed updates via e-mail, choose *Send digests of all my feeds*.
- The date by which feed updates are sorted
  Feed updates are sorted, by default, according to the date they were last commented. If you prefer that feed updates be sorted according to the date they were created, then select *According to creation date*.

On this screen, you can also define default event types for the items that trigger feed updates.

For more information about source events, see Feed Events [page 27].

5.5.3 Feed Events

For each type of feed source there are defined events which, when selected, trigger feed updates. The table below lists those events and, in some cases, an additional description of the event.

Feed Events

Source	Event	Default Event	Additional Description
Account	Creation	Yes	A feed update is posted if an owner is assigned when the account is created. This default event cannot be switched off.
	Creation of Contact	Yes	
	Address Change	No	A feed update is posted if changes are made to any address on the account.
	Owner or Territory Change	Yes	
	Status Change	No	
	Addition or Removal of Attachment or Note	No	
	Activity Creation or Change	No	A feed update is posted if an account activity (that is, an appointment, task or phone call) is created or changed.
	Update Posted from the Item View	Yes	When someone posts an update from the item view, the feed update will contain a byline indicating who posted the update. This default event cannot be switched off.

Source	Event	Default Event	Additional Description
Opportunity	Creation	Yes	A feed update is posted if an owner is assigned when the opportunity is created. This default event cannot be switched off.
	Status Change	Yes	
	Sales Phase Change	Yes	
	Revenue Change	Yes	
	Category Change	Yes	
	Chance of Success Change	Yes	
	Addition or Removal of Contact	No	
	Addition or Removal of Sales Team Member	No	
	Addition of Removal of Product or Quantity Change	No	
	Addition or Removal of Attachment or Note	No	
	Activity Creation or Change	No	A feed update is posted if an opportunity activity (that is, a task) is created or changed.
	Owner Change	Yes	
	Addition or Removal of Competitor	No	
	Quote and Sales Order Creation	Yes	A feed update is posted if a quote request or sales order request is created. The resulting feed update will not contain user information.
	Update Posted from the Item View	Yes	When someone posts an update from the item view, the feed update will contain a byline indicating who posted the update. This default event cannot be switched off.
Lead	Creation	Yes	A feed update is posted if an owner is assigned when the lead is created. This default event cannot be switched off.
	Status Change	Yes	
	Qualification Level Change	Yes	
	Addition or Removal of Attachment or Note	No	
	Addition or Removal of Contact	Yes	
	Lead Conversion	Yes	A feed update is posted if the lead is converted to an opportunity.
	Activity Creation or Change	No	A feed update is posted if a lead activity (that is, a task) is created or changed.
	Addition or Removal of Product or Quantity Change	No	
	Owner Change	Yes	
	Update Posted from the Item View	Yes	When someone posts an update from the item view, the feed update will contain a byline indicating who posted the update. This default event cannot be switched off.

Source	Event	Default Event	Additional Description
Ticket	Status Change	Yes	
	Service Request Escalation	Yes	A feed update is posted if the ticket is escalated.
	Service Request Processor Change	Yes	A feed update is posted if the agent assigned to the ticket is changed.
	Text Changes	Yes	A feed update is posted anytime new text is added to the ticket by anyone other than the assigned agent, for example the customer responds or another agent adds a note.
Contact	Contact Details Change	Yes	A feed update is posted if changes are made to the contact details on the header level only (for example, function, department, or phone).
	Address Change	Yes	A feed update is posted if changes are made to any address for the contact.
	Activity Creation or Change	No	A feed update is posted if a contact activity (that is, an appointment, task or phone call) is created or changed.
	Update Posted from the Item View	Yes	When someone posts an update from the item view, the feed update will contain a byline indicating who posted the update. This default event cannot be switched off.
Employee	User Update	Yes	
	Profile Change	No	A feed update is posted if changes are made to the employee profile such as phone, mobile, e-mail, or address information.
	User Requested to Follow You	Yes	This event is only relevant if you have chosen (via *Managing Feed Settings*) not to have requests to follow you automatically accepted. This default event cannot be switched off.
	User Accepted a Request to be Followed	Yes	This default event cannot be switched off.
	User Rejected a Request to be Followed	Yes	If provided, the reason for the rejection is included in the requestor's feed update. This default event cannot be switched off.
	Activity Creation or Change	Yes	A feed update is posted if an employee activity (that is, an appointment, task or phone call) is created or changed.
	Private Update	Yes	Private updates are declared using the asterisk (*) notation. This default event cannot be switched off.
Feed Item	Comment or Reply	Yes	A feed update is posted to all recipients of the original feed item when a comment or reply is posted, unless they have deleted the original feed item. This default event cannot be switched off.
Group	Addition or Removal of Member	Yes	
	Addition or Removal of Attachment	No	

5.6 VIDEO: Using the Toolbar and Panes

Video

Using the Toolbar and Panes (3m 35s)

Find out how to use the toolbar and panes to search for information and post updates.

5.7 Shelf

The shelf displays items that you flag or mark as favorite. These items remain on the shelf for quick access until you remove them.

Tasks

Adding Items to the Shelf

1. Access the item that you want to add to the shelf.
2. Set a flag or favorite indicator for the item.
   The item you flagged or marked as a favorite now appears in the shelf pane for quick access.

Opening Items from the Shelf

1. Open the shelf pane by choosing *Shelf*.
2. Use the following predefined filters to sort the items:
   - *All*
   - *Flagged Items*
   - *Favorite Items*
3. To open an item from the shelf, choose the name of that item, which appears as a link.

   > To open a feed update, choose the *Open* icon. (The links in feed updates link to the item or person in the feed update.)

Removing Items from the Shelf

Items remain in the shelf pane until you remove them manually. To do so, you have the following options:

- Remove all flag and favorite indicators from the item.
- Remove the item from the shelf directly as follows:
  a. Rest the cursor on the shelf item.
     The *Remove* icon appears.
  b. Choose *Remove*.
     The item disappears from the shelf pane, and the flag and favorite indicators are removed from the item. The item still exists in the system.

5.8 VIDEO: Using the Shelf, Flags, and Favorites

Video

Using the Shelf, Flags, and Favorites (2m 50s)

Find out about the shelf, how flags and favorites are connected to it, and how to use it to keep important items at your fingertips.

5.9 Tags

Tags are indicators that help you categorize items. Tags appear in the tag pane and in item headers.

Tasks

Creating or Adding a Tag

1. Open the item to which you want to add a tag.
   The tags area is located in the item header.
2. In the tags area, choose the plus sign (+), which has the tooltip *Add Tag*.
3. Enter the name you want to use for your tag then choose `Enter`. You have the following options:
   - To enter a public tag that all users can see, enter the tag text in the entry field.
   - To enter a private tag that only you can see, enter an asterisk (*) before the tag name.

     For example, at a sales conference, you talk to five potential customers who are eager to buy your product. You want to follow up on these leads yourself, so you use a private tag, `*hot_leads`, so that you can find them easily in the system and call them next week.

   - Tags cannot contain spaces.
   - Tags are not case-sensitive and always appear in the *Tags* pane as lowercase.

     For example, the system regards the following tags as the same tag, which appears in the system as "hartford":
     - Hartford
     - HARTford
     - hartford
4. As you type your tag, the system runs an automatic search, comparing your entry to existing tags. You can accept a suggested tag from the list presented by the solution.
   When you accept a suggested tag, the system creates a copy of that tag for you. As a result, you can edit, remove, or delete any tag that you assign to an item without affecting this tag in the rest of the system.
5. To add an additional tag, click the *Edit* tooltip, which appears when you click in the *Tags* area in the item header and add your tag to the list.
6. Save your entries.

Displaying Items Assigned to a Tag

1. Open the tags pane by choosing *Tags*.
   For more information about panes, see Layout of the User Interface.
2. Search or filter the list.
   To search the list, enter a search term in the *Find...* search field at the top of the pane. When you click on the result of the search, the *Search* screen appears and lists the corresponding items.

To filter the list, you can use the following predefined filters:

- *Recent*
  This filter shows the 50 most recently used tags from the last 30 days. This list is sorted chronologically so that the tags that were used most recently appear at the top of the list.
- *Private*
  This filter shows your 50 most frequently used private tags in the system.
- *Public*
  This filter shows the 50 most frequently used public tags in the system.
- *Top 50*
  This filter shows a ranked list of the top 50 most popular tags that have been used in the system, including both your private tags and all public tags.
  A tag can be used multiple times. The sum of all usages of exactly the same tag defines the rank of that tag in the list.

You can display the tags in list view and cloud view by using the corresponding buttons at the bottom of the pane. For more information about display options, see Understanding the Display Options.

3. Select a tag from the list.
   The system runs a search for items assigned to that tag and displays them as search results. You can also run this same search using shortcuts in the global search. For more information, see Running a Global Search.

Renaming a Tag

1. In the *Tags* pane, click on the tag you want to rename.
   This opens the *Search*, where all items containing your tag are listed.
2. Open the item in which you want to change the tag.
3. Delete the existing tag and replace it with the new tag.

Removing a Tag from an Item

1. Open the item that contains the tag that you want to remove.
2. In the item header, in the tags section, all the tags for this item appear.
3. Click the pencil icon that appears when you hover in the *Tags* area. Rest the cursor on the tag that you want to remove.
   A *Remove* (*x*) icon appears to the right of your tag.

   > If you move the cursor over a tag and the *Remove* (*x*) icon does not appear, it means that it is someone else's tag, and you cannot remove it.

4. Choose *Remove*.
   The tag is removed from this item only. All other items in the assigned to this tag keep their assignments and the tag is still displayed by the solution as one of your tags.

Deleting a Tag

1. In the *Tags* pane, find the tag you want to delete and choose the *Delete* icon.
2. Confirm the message that appears at the bottom of the pane.
   The tag is deleted from the system and no items are associated with the tag any longer.

Automatically Adding Tags to Feed Updates

When you add a tag to a feed source, the same tag is added automatically to any subsequent feed updates from this source.

You can only add private tags to feed sources. If you enter or select a public tag, the system switches it to a private tag by adding an asterisk (*) before the tag text that you entered.

For example, one of your colleagues has been helpful in the past with marketing questions, so you add her as a feed source, which you tag with `*marketing`. When a feed update from her arrives, it automatically appears with a private tag, `*marketing`. Since the tag is private, you are the only one who sees this tag when you view the feed update. Thanks to the tag, when you see feed updates from her, you can identify the source immediately, and you can use a tag search to find other feed updates from her.

5.10 VIDEO: Organizing Items with Tags

Video

Organizing Items with Tags (2m 55s)

Find out how to use tags to organize and quickly find items.

5.11 Download

Tasks

Ensure that your Web browser is set to prompt automatically for file downloads. If needed, consult your Web browser documentation for additional information.

Downloading Add-Ins to Synchronize and Export Data

To download add-ins that enable data to be communicated to external applications, proceed as follows:

1. Under *Download*, select one of the following add-ins:
   - Add-In for Microsoft Outlook®
     For information about using SAP Cloud for Customer together with Microsoft Outlook, see Working From Microsoft Outlook [page 40].
   - Add-In for Microsoft Excel®
     For information about using SAP Cloud for Customer together with Microsoft Excel, see Working with Reports in Microsoft Excel.
2. Choose *Download*.
3. Select one of the following download options:
   - To execute and install the add-in directly, choose *Run*.
     Follow the instructions provided by the setup wizard to install the add-in directly. When the setup wizard has finished, you may begin to use the add-in.
   - To download the add-in to your preferred directory, choose *Save*.
     Execute the add-in from your preferred directory at a later time, then follow the instructions provided by the setup wizard to install the add-in for subsequent use.

Downloading Mobile Applications

Under *Download*, select one of the mobile applications. This opens a new browser window containing a Web site where you can download the mobile application for the appropriate Cloud solution.

For more information about the mobile application you are interested in, see:

- SAP Cloud for Customer for Android [page 129]
- SAP Cloud for Customer for iPad [page 135]
- SAP Cloud for Customer for iPhone [page 150]
- SAP Cloud for Customer for BlackBerry [page 132]

5.12 Incidents

You can create incidents to report problems with the user interface to your administrator.

Tasks

Creating an Incident

To create an incident:

1. Open the *Help Center* pane and click *Report Incident*.
2. In the window that appears, enter the following information:
   - Enter a *Subject*.
   - Select a *Priority* setting from the drop-down.
   - Enter a *Category*.
   - Enter a note describing the issue in the *Description* field.
3. Click Save and Close to submit the incident or Close if you do not want to submit the incident.

Editing an Incident

You can add additional notes, files, and Web site links to an incident to provide information that will help your administrator understand the user interface problems that you have experienced.

To add notes to the incident, proceed as follows:

1. Open the *Help Center* pane and click *Track My Incidents*.
2. Open the incident by clicking either the subject or the ID number.
3. Enter any additional information into the *Note* box.
4. Click Submit.

To add files to the incident, proceed as follows:

1. Open the *Help Center* pane and click *Track My Incidents*.
2. Open the incident by clicking either the subject or the ID number.
3. Click *Attachments*.
4. Click Add then choose *File*.
5. Use the browser in the window that opens to navigate to the item on your desktop.

6. Double-click the item.
7. If necessary, add a title and comments.
8. Click Add.

To add a link to the incident, proceed as follows:

1. Open the *Help Center* pane and click *Track My Incidents*.
2. Open the incident by clicking either the subject or the ID number.
3. Click *Attachments*.
4. Click Add then choose *Link*. A browser window opens.
5. In the window that opens, specify the URL of the link that you want to add.
6. If necessary, add a title and comments.
7. Click Add.

Creating a Trace for an Incident

A trace is a record of the program running in the background. Your administrator may ask you to provide this information to understand the incident you have reported.

To record a trace, proceed as follows:

1. Open the *Help Center* pane and click *Track My Incidents*.
2. Open the incident by clicking either the subject or the ID number.
3. Click Start Trace.
4. Perform any activities in the user interface as instructed by your administrator.
5. When you are finished, click Stop Trace.
   The trace recording will be sent automatically to your administrator.
6. If you make a mistake while recording the trace, click Cancel Trace and re-perform this activity.

5.13 Legacy Groups

> Groups are now handled via SAP JAM. Groups created in previous versions of SAP Cloud for Customer are now labeled **Legacy Groups**. You can continue to edit and manage legacy groups, but cannot create new groups in this tab. For more information on the Groups function in SAP JAM, refer to the documentation located here .

You can use groups to collaborate with other employees via the feed and to share attachments. When you create a group, you automatically become the group owner.

There are three types of groups:

- Public groups are visible to all employees and requests to join are automatically accepted. Anyone can post updates, add and remove attachments, or add members.
- Private groups are visible to all employees but require the owner to accept requests to join. You must be a member to post updates, add and remove attachments, or add members.
- Secret groups are only visible to members and require an invitation to join and owner approval. You must be a member to post updates or add and remove attachments. New members must be approved by the group owner.

Tasks

Changing Group Attributes

If you are the group owner, you can change the group type, or status. To do this, display the group details and then position the cursor over the corresponding field in the group header and click it to enter the edit mode.

Adding Members to a Group

1. Display the group details.
2. Select the *Members* tab.
3. Choose *Add*.
4. Select the employee you wish to add or invite and save your entry.

   Any member of a public or private group may add new members. For secret groups of which you are not the owner, the owner receives a notification to either accept or decline the member request.

Removing Members from a Group

To remove yourself or other members from a group, from the *Members* tab of the group click the *Remove* icon for each member you want to remove and confirm.

If you are the group owner, you must assign a new owner before you can leave the group.

Changing the Group Owner

If you are the current group owner, you can assign a group member to be the new owner.

To change the group owner, from the group header choose *Actions* > *Change Owner*, and select a group member.

5.14 Activities

Activities are methods of recording information resulting from interactions between business partners during the customer relationship life cycle. Each activity type includes a notes feature that allows you to add more information as necessary.

The following table lists the available activity types and options for creating them:

Activity	Description	Create from Activities View	Create from Reference Item	Create from Microsoft Outlook	Create from IBM Lotus Notes
Appointments	A planned activity that is maintained in a calendar, including external appointments and scheduled meetings with business partners. Appointments contain information regarding the business partner involved and the date on which it is to take place. To check your schedule for upcoming visits and appointments, you can use the *Calendar* pane. Other activity types, such as phone calls, e-mails, and tasks, do not appear in the *Calendar* pane.	X	X	X (sync in both directions)	X (sync in both directions)
E-mails	An electronic message that is sent from one person to another person or group.			X (sync in one direction only)	X (sync in one direction only)

Activity	Description	Create from Activities View	Create from Reference Item	Create from Microsoft Outlook	Create from IBM Lotus Notes
Phone calls	A business option that allows you to track and document your phone calls with business partners. If your solution has Cloud for Service features enabled, you can convert phone calls into tickets. Go to *Activities* > *Phone Call*. Select *Actions* and then *Convert to Ticket*. A ticket has been created that contains the information from the phone call activity. The new ticket can be found in the *Queue*.	X	X		
Tasks	A unit of work that has to be done by a user.	X	X	X (sync in both directions)	X (sync in both directions)

Activity	Description	Create from Activities View	Create from Reference Item	Create from Microsoft Outlook	Create from IBM Lotus Notes
E-Mail Blast	You can use an e-mail blast to send mass e-mails to a target group. A subset of the campaign tracking options are available for e-mail blasts. To send an e-mail blast, you must first do the following: • Ensure that your administrator has set up mass e-mail in your system. For more information, see Activation of Mass E-Mail. • Save an e-mail template on your local drive. For more info				

For information about the options related to SAP Cloud for Customer in Microsoft Outlook, see Working From Microsoft Outlook [page 40].

For information about the options related to SAP Cloud for Customer in IBM Lotus Notes, see Working From IBM Lotus Notes [page 47].

5.15 E-Mail

5.15.1 Working From Microsoft Outlook®

The SAP Cloud for Customer Add-In for Microsoft Outlook allows you to exchange information between Microsoft Outlook and SAP Cloud for Customer. After installing the add-in, you can do the tasks listed below right from Microsoft Outlook.

Microsoft Outlook integration supports Microsoft Outlook 2007 and Microsoft Outlook 2010.

> Microsoft Outlook integration does not support the social media and service features of SAP Cloud for Customer.

Tasks

Installing the Add-In for Microsoft Outlook Integration

Each user who wants to use SAP Cloud for Customer functions from Microsoft Outlook must install the add-in on his or her computer. To download the add-in, you must have administrative rights on the computer.

> To avoid compatibility issues with previous releases, make sure that you have installed the latest version of the add-in.

1. In SAP Cloud for Customer, choose *Downloads*.
2. Choose the download link for the add-in for Microsoft Outlook.
3. Install the add-in.
   Follow the instructions in the installation wizard.
4. Restart Microsoft Outlook to activate the add-in.
   When you restart Microsoft Outlook SAP Cloud for Customer appears on your Microsoft Outlook screen, either as a separate toolbar (Microsoft Outlook 2007) or as a separate tab in the ribbon (Microsoft Outlook 2010).

Making Settings for SAP Cloud for Customer Add-In for Microsoft Outlook

1. Enable the side pane in Microsoft Outlook as follows:

Microsoft Outlook Version	Action
2007	Enable the view *SAP Cloud for Customer*.
2010	Enable the add-in *SAP Cloud for Customer*.

2. Check the SAP Cloud for Customer folder locations in Microsoft Outlook as follows:

Microsoft Outlook Version	Action
2007	Check tools for *SAP Cloud for Customer Add-In Settings*.
2010	Choose ▶ *SAP Cloud for Customer* ▶ *Settings* ◀.

The add-in automatically creates the synchronization folders, including the following:

- *Default Folder*
  This is the main folder where error and conflict information is stored.
- *Accounts Folder*
  This folder contains the accounts downloaded from SAP Cloud for Customer.
- *Contacts Folder*
  This folder contains the contacts downloaded from SAP Cloud for Customer.

To change any of these folders, click the folder link, select a new folder, and choose OK.

3. In the *Advanced Settings* section, set the following:
   a. If you want the system to display synchronization-related notifications in a message in the Microsoft Windows task bar, select the *Display Synchronization Notifications* checkbox.
   b. If you want the system to display synchronization-related errors in a message in the Microsoft Windows task bar, select the *Display Synchronization Errors* checkbox.

You can use a right click on the SAP Cloud for Customer add-in icon in the Microsoft Outlook toolbar as a shortcut to display synchronization errors and notifications directly, access the error and conflict folders, open the activities list, and send meeting requests.

Logging On to SAP Cloud for Customer From Microsoft Outlook

1. In Microsoft Outlook, under SAP Cloud for Customer, click the button to log on to SAP Cloud for Customer.
2. In the dialog box that appears, select the row displaying the system where your SAP Cloud for Customer system is located and choose *OK*.
   The logon is certificate-based and runs automatically in the background.
   Your Microsoft Outlook is now connected with the SAP Cloud for Customer system that you selected.
3. If there is a problem with the certificate for your user, or if you are not working with certificates, a dialog box appears, where you can enter your user ID and password.
   Enter your URL in the *SAP System* field, leaving out the path or directory information at the end of the URL. For example, you log on with URL `http://Test.sap.corp:7000`, and not `http://Test.sap.corp:7000/irj/portal`.
   You can confirm that you have logged on to the system by checking the title of the button that you used to log on. If the text has switched to *Log Off*, you have logged on successfully.

When you are working offline and cannot log on to the system, any changes to relevant e-mails, appointments, and tasks, or new items for synchronization to SAP Cloud for Customer are kept in a pool in Microsoft Outlook. Actual synchronization of these items occurs automatically as soon as you log on to SAP Cloud for Customer using the add-in.

If you are logged on to SAP Cloud for Customer with the add-in for many hours without any action, you may receive an authorization error when trying to use a Microsoft Outlook integration function. In this case, your user cookies may have expired. Simply log off and log on again.

Synchronization of Contacts and Accounts

When you install the latest add-in, any contacts and their corresponding accounts that you had added to Microsoft Outlook previously are removed from Microsoft Outlook.

> To ensure that your contacts appear in Microsoft Outlook and are synchronized in the future, we recommend that you add each one again. For more information, see section Adding Contacts from SAP Cloud for Customer into Microsoft Outlook.

Viewing SAP Cloud for Customer Information

When you select an e-mail from an SAP Cloud for Customer contact, information related to that contact and account appears in the side pane. You can access contact and account information, as well as related opportunities, leads, and activities for the current week, and you can personalize how you would like to view the content. From the side pane, you can search SAP Cloud for Customer contacts, and also access the *Feed* and *Shelf* for contacts and accounts.

- Select an e-mail from an SAP Cloud for Customer contact to view information for that contact, and account.
- Within the list of *Opportunities*, *Leads*, or *Recent Activities* for an SAP Cloud for Customer contact, right mouse click to select the information for each that you want to view.
- Select *Feed* to view, post, or comment on feed updates.
- Select *Shelf* to view your flagged and favorite items.

> Items listed throughout the side pane are hyperlinks. Click an item name to open that item in SAP Cloud for Customer.

Pinning Contact Information in the Side Pane

When you select an e-mail in your inbox from an SAP Cloud for Customer contact, the information for that contact appears in the side pane. Selecting a message from a different SAP Cloud for Customer contact updates the information in the side pane. If you want the information for a specific contact to remain available in the side pane, do the following:

1. Click the pin icon at the top of the side pane to keep this contact information available while you select other e-mail messages.
2. Click the pin icon again to allow the side pane to dynamically update contact information based on the currently selected message.

Adding E-Mails for Synchronization

> If you have contact information showing in the SAP Cloud for Customer side pane, you can associate an e-mail to an opportunity, lead, or account listed under that contact simply by using drag and drop. The e-mail is associated automatically with the lead, opportunity, or account.
>
> If you wish to add an e-mail for synchronization and do not have relevant contact information visible in the side pane, proceed as follows:

1. In Microsoft Outlook, open an existing e-mail, and under *SAP Cloud for Customer*, choose *Add E-Mail*.

   > You can add one or more e-mails directly, without opening them, by right-clicking on them in your inbox, and choosing *Add E-Mail*.

When you create a new e-mail, you can synchronize and send it by choosing *Send and Add E-Mail*. This step combines the synchronize and send steps, saving you time.

2. Add a reference to an account, if desired.
3. Choose *Submit*.
An e-mail activity is created in SAP Cloud for Customer, based on information in the Microsoft Outlook e-mail.

It is not possible to create an e-mail in SAP Cloud for Customer. All new e-mails must be created in Microsoft Outlook directly, and synchronized with SAP Cloud for Customer.

Adding Appointments for Synchronization

If you have contact information showing in the SAP Cloud for Customer side pane, you can associate an appointment with an opportunity, lead, or account listed under that contact simply by using drag and drop. The appointment is associated automatically with the lead, opportunity, or account.

If you wish to add an appointment for synchronization and do not have relevant contact information visible in the side pane, proceed as follows:

1. In your calendar in Microsoft Outlook, open an appointment and under *SAP Cloud for Customer*, choose *Add Appointment*.

   You can add an appointment directly, without opening it, by right-clicking on the appointment in your calendar, and choosing *Add Appointment*.

   When you create a new appointment, you can synchronize it and send it by choosing *Save, Send, and Sync Appointment*. This step combines multiple steps, saving you time.

2. Add a reference to an account, if desired.
3. Choose *Submit*.
An appointment activity is created in SAP Cloud for Customer, based on the information in the Microsoft Outlook appointment.

You can open, create, or edit an appointment in SAP Cloud for Customer as well. For more information, see About Activities [page 36]. To synchronize any future changes to the appointment in SAP Cloud for Customer or in Microsoft Outlook, repeat the steps above.

It is not possible to synchronize recurring appointments.

If you add or change attendees in an SAP Cloud for Customer appointment, you can send the meeting request as follows:

1. Ensure that the appointment is synchronized, by repeating the steps above.
2. Open the appointment in Microsoft Outlook and send the meeting request.

Adding Tasks for Synchronization

> If you have contact information showing in the SAP Cloud for Customer side pane, you can associate a task with an opportunity, lead, or account listed under that contact simply by using drag and drop. The task is associated automatically with the lead, opportunity, or account.
>
> If you wish to add a task for synchronization and do not have relevant contact information visible in the side pane, proceed as follows:

1. In Microsoft Outlook, open a task in your *To-Do List* and choose *SAP Cloud for Customer* > *Add Task*.
2. Add an account as a reference, if desired.
3. Choose *Submit*.
   A task activity is created in SAP Cloud for Customer, based on information in the Microsoft Outlook task.

You can open, create, or edit a task in SAP Cloud for Customer as well. For more information, see About Activities [page 36].

> If you change a task in SAP Cloud for Customer, the changes are automatically synchronized to Microsoft Outlook within five minutes. However, there is no automatic synchronization if you change a task in Microsoft Outlook that has already been synchronized. In this case, open the task in Microsoft Outlook, make your changes, and then choose *Add Task* to trigger synchronization to SAP Cloud for Customer.

Adding Appointments, Tasks, and E-Mails with Reference

You can add e-mails, appointments, and tasks with reference to any of your SAP Cloud for Customer accounts, opportunities, or leads. In the steps listed below, an e-mail activity is used as an example, but the steps are similar for all activity types.

> If you have contact information showing in the SAP Cloud for Customer side pane, you can associate an e-mail, appointment, or task to an opportunity, lead, or account listed under that contact simply by using drag and drop. The activity is associated automatically with the lead, opportunity, or account.
>
> If you wish to add an e-mail, appointment, or task for synchronization and do not have relevant contact information visible in the side pane, proceed as follows:

To add an activity with **reference to an account or campaign**, proceed as follows:

1. In Microsoft Outlook, to synchronize an e-mail to SAP Cloud for Customer, open an e-mail and under *SAP Cloud for Customer*, choose *Add E-Mail*.
2. Choose *Add Reference* > *Account* or *Add Reference* > *Campaign*.
   You can also search for another account and add the e-mail with that account as a reference.
3. An e-mail activity is created automatically in SAP Cloud for Customer under the account that you chose.

To add an activity with **reference to an opportunity or lead**, proceed as follows:

> To add a reference to an opportunity or lead, you must first add a reference to an account.

1. In Microsoft Outlook, to synchronize an e-mail to SAP Cloud for Customer, open an e-mail and under *SAP Cloud for Customer*, choose *Add E-Mail*.
2. Choose *Add Reference* > *Account*.
3. Add a reference to an opportunity or lead.

When you search for the opportunity or lead, the results list displays the opportunities or leads that are associated with the referenced account.

4. Select the relevant item from the resulting list.
5. The e-mail is copied automatically into SAP Cloud for Customer and appears in the opportunity or lead that you selected.

> You can also drag individual e-mails, appointments, or tasks and drop them on an account, lead, or opportunity saved in your shelf to associate the items.

Displaying Synchronized Appointments, Tasks, or E-Mails in SAP Cloud for Customer

1. In SAP Cloud for Customer, go to *Activities*.
2. Choose the *Appointments*, *Tasks*, or *E-Mails* subview.
   The appointment, task, or e-mail that you synchronized from Microsoft Outlook appears in SAP Cloud for Customer in the *Activities* view. If you added an account, opportunity, contact, or lead as a reference, it also appears in the item view for that item.

Deleting Appointments or Tasks

In the steps listed below, an appointment is used as an example, but the steps are similar for both appointments and tasks.

1. In Microsoft Outlook, open the appointment you want to delete.
2. Choose *SAP Cloud for Customer* > *Delete Appointment*.

> You can only delete appointments or tasks that have been synchronized.

For appointments and tasks that were previously synchronized, the deletion is synchronized in both Microsoft Outlook and SAP Cloud for Customer.

Creating Accounts or Contacts

1. In Microsoft Outlook, go to the contacts view.
2. In the navigation pane under *My Contacts*, choose the SAP Cloud for Customer folder for contacts.
3. Choose *New Contact*.
4. Enter the information for the contact person.
5. Under *SAP Cloud for Customer*, choose *Add Contact*. In the screen that appears, search for and select an existing account.
6. If the account that you need does not exist, create a new account by entering information in the required fields.
7. Assign the account to the contact and save your entries.

> Accounts created directly in the *Accounts from SAP Cloud for Customer* folder cannot be synchronized. Accounts can only be created from the contact area. However, once the account is created in the system, after the next synchronization, it appears in the accounts folder.

To synchronize this contact and its associated account with SAP Cloud for Customer, choose *Add Contact* > *Submit*.

The user who creates and synchronizes a new account from Microsoft Outlook is automatically the owner for that account.

The ability to create and synchronize accounts and contacts depends on your system authorizations, as well as your synchronization settings. If you have any questions or difficulties, contact your administrator.

Adding Contacts from SAP Cloud for Customer into Microsoft Outlook

1. In Microsoft Outlook, on the *SAP Cloud for Customer* side pane, on the *Contacts* tab, search for a contact name.
   A list of contacts found in SAP Cloud for Customer appears in the side pane.
2. Select the contact that you want to add to your contacts in Microsoft Outlook and choose *Click to Save Contact*.
   The contact information is transferred from SAP Cloud for Customer and appears in your contacts in Microsoft Outlook.

Working with Feed Updates

If you enable SAP JAM in SAP Cloud for Customer, the feed tab in the Microsoft Outlook side pane displays the last feeds before you switched to SAP JAM. It is not possible to see feed posts from SAP JAM in the side pane at this time.

1. Select *Feed* in the side pane, where you can do the following:
   - Display the feed updates that are in SAP Cloud for Customer for the relevant contact and account.
   - Enter a new feed update just like you would in SAP Cloud for Customer.
     Feed updates are synchronized automatically, so your feed update also appears in SAP Cloud for Customer.

     A feed update entered for an account references the account, and a feed update entered for a contact references the contact, similar to entering a feed update in the account or contact item view.
   - Enter comments on a feed update.
   - Repost a feed update.
   - Accept or decline a follow request.
   - Click a link to go to SAP Cloud for Customer.

Displaying Synchronization Details for an Item

1. Open the item in Microsoft Outlook.
2. In the bottom frame of the item, in the *Details — SAP Cloud for Customer* section, click the link.

Removing E-Mails from SAP Cloud for Customer

You can remove an e-mail message from SAP Cloud for Customer (browser only) if you linked it to the SAP system originally. The e-mail is not deleted: it still exists in its original e-mail system from which it was synchronized with the SAP system (IBM Lotus Notes or Microsoft Outlook). The link to that e-mail is simply removed from SAP Cloud for Customer.

To remove e-mails from SAP Cloud for Customer, under *Activities*, hover over an e-mail and choose *Remove*.

5.15.2 Working From IBM Lotus Notes

The SAP Cloud for Customer Add-In for IBM Lotus Notes® allows you to exchange information between IBM Lotus Notes and SAP Cloud for Customer. After installing the add-in, you can do the following tasks right from IBM Lotus Notes.

IBM Lotus Notes integration supports IBM Lotus Notes 8.5.3 or higher.

IBM Lotus Notes integration does not support business-to-consumer (B2C) service processes, such as those involving individual customers, in SAP Cloud for Social Engagement and SAP Cloud for Service. IBM Lotus Notes integration is supported for business-to-business (B2B) service processes, such as those involving accounts and contacts.

Prerequisites

- IBM Lotus Notes has been installed, set up, and configured on your computer.
- To allow IBM Lotus Notes to accept plug-ins, you have added the following line to your `plugin_customization.ini` file:
  `com.ibm.notes.branding/enable.update.ui=true`

  If you are using the Microsoft Windows® 7 operating system, to avoid permission errors, run notepad as an administrator and edit the .ini file as follows:

  1. Search programs and files for “notepad”.
  2. When the notepad text editor appears, run it as administrator.
  3. In notepad, open your IBM Lotus Notes .ini file, make the changes directly, and save.

Tasks

Installing the Add-In for IBM Lotus Notes

Each user who wants to use SAP Cloud for Customer functions from IBM Lotus Notes must install the add-in on his or her computer. To download the add-in, you must have administrative rights on the computer.

To avoid compatibility issues with previous releases, make sure that you have installed the latest version of the add-in.

1. In SAP Cloud for Customer, choose *Downloads*.
2. Download the add-in for IBM Lotus Notes.

   The add-on for IBM Lotus Notes is a zip file.

3. Save the zip file locally.
4. In IBM Lotus Notes, go to the application install step and use the option to search for new features to install.

5. Add to the location of the zip file that you just downloaded.
6. Follow the on-screen instructions to complete the installation.
7. To activate the plug-in, restart IBM Lotus Notes.

Making Settings for SAP Cloud for Customer Add-In for IBM Lotus Notes

You can make the following settings for the SAP Cloud for Customer sidebar in IBM Lotus Notes:

- Synchronization
    - Enable automatic synchronization to exchange data from IBM Lotus Notes to SAP Cloud for Customer for the items listed in this section.
    - Set up the timing for synchronization.
- User interface settings
  Select the sections you want to see in the SAP Cloud for Customer sidebar.
- Advanced
  Configure the appearance of notifications.

Logging On to SAP Cloud for Customer From IBM Lotus Notes

1. From the SAP Cloud for Customer sidebar in IBM Lotus Notes, enter your URL of the SAP system.

   > Leave out the path or directory information at the end of the URL, and end the URL with `.com`. For example, you on log on with URL: http://Test.sap.com and not http://Test.sap.com:7000/iri/portal.

2. Enter the user name and password.

   > If you choose the options for remembering your password and automatic login, you will stay logged on automatically with the same user name and password in the system.

   Your IBM Lotus Notes is now connected with the SAP Cloud for Customer system that you selected.

   > When you are working offline and cannot log on to the system, any changes to relevant e-mails, appointments, and tasks, or new items for synchronization to SAP Cloud for Customer are kept in a pool in IBM Lotus Notes. Actual synchronization of these items occurs automatically as soon as you log on to SAP Cloud for Customer using the add-in.

   > If you are logged on to SAP Cloud for Customer with the add-in for many hours without any action, you may receive an authorization error when trying to use an IBM Lotus Notes integration function. In this case, your user cookies may have expired. Simply log off and log on again.

Running Initial Synchronization for Contacts and Accounts

The system synchronizes to and from IBM Lotus Notes any contacts that have been assigned to your accounts in the SAP Cloud for Customer system. To access an account's contacts, you must be on that account's team, or assigned as an owner.

To synchronize all contacts and accounts from SAP Cloud for Customer to IBM Lotus Notes, proceed as follows:

> Prerequisite: In IBM Lotus Notes on the SAP Cloud for Customer sidebar, make the appropriate settings for contacts, appointments, and tasks.

1. From IBM Lotus Notes, choose *SAP Cloud for Customer* > *Sync Now*.
2. A progress bar appears in the system tray area.

3. When the synchronization is complete, folders for accounts and contacts in SAP Cloud for Customer are available in the contacts within IBM Lotus Notes.

The system synchronizes all of your accounts and contacts to IBM Lotus Notes and groups them into folders for SAP Cloud for Customer accounts and contacts. Any future changes to these contacts or accounts in SAP Cloud for Customer or in IBM Lotus Notes are handled as follows:

- Changes to contacts in IBM Lotus Notes are synchronized with SAP Cloud for Customer.
  To synchronize contacts, they must be assigned to an account.
  Although it is possible to delete a contact both in IBM Lotus Notes and in SAP Cloud for Customer, the deletion is not synchronized. If required, you must manually delete the contact in the opposite system.
- Changes to accounts must be made in SAP Cloud for Customer directly. During the next synchronization, these changes will be updated in IBM Lotus Notes.

Viewing SAP Cloud for Customer Information

When you select an e-mail from a person who is also listed as one of your contacts in SAP Cloud for Customer, information related to that contact and account appears in the sidebar. You can access contact and account information, as well as related opportunities, leads, and activities for the current week, and you can personalize how you would like to view the content. From the sidebar, you can search SAP Cloud for Customer contacts.

- To see information for a contact or account, select an e-mail from a person who is also listed as one of your contacts in SAP Cloud for Customer.
- Other information that may appear in the sidebar for contacts includes opportunities, leads, and recent activities.

> Any hyperlinks that appear in the sidebar are shortcuts to items in SAP Cloud for Customer. To open the item in SAP Cloud for Customer, click the link.

Adding E-Mail for Synchronization

> In IBM Lotus Notes, if you have contact information showing in the SAP Cloud for Customer sidebar, you can simply use drag and drop to associate an e-mail with an opportunity, lead, or account listed in the SAP Cloud for Customer sidebar for that contact.
>
> If you wish to add an e-mail for synchronization and do not have relevant contact information visible in the sidebar, use the following procedure.

1. In IBM Lotus Notes, select an e-mail, right click it, and add the e-mail to SAP Cloud for Customer.
2. Add a reference to an account, opportunity, or lead.
3. Submit your changes.
   An e-mail activity is created in SAP Cloud for Customer, based on information in the IBM Lotus Notes e-mail.

> It is not possible to create an e-mail in SAP Customer. All new e-mails must be created in IBM Lotus Notes directly, and synchronized with SAP Cloud for Customer.

Adding Appointments for Synchronization

In IBM Lotus Notes, if you have contact information showing in the SAP Cloud for Customer sidebar, you can simply use drag and drop to associate an appointment with an opportunity, lead, or account listed under that contact.

If you wish to add an appointment for synchronization and do not have relevant contact information visible in the sidebar, use the following procedure.

1. In your calendar in IBM Lotus Notes, select an appointment, right-click it, and add the appointment to SAP Cloud for Customer.
2. Add a reference to an account, opportunity, or lead.
3. Submit your changes.
   An appointment activity is created in SAP Cloud for Customer, based on the information in the IBM Lotus Notes appointment.

You can open, create, or edit an appointment in SAP Cloud for Customer as well. For more information, see Activities [page 36]. To synchronize any future changes to the appointment in SAP Cloud for Customer or in IBM Lotus Notes, repeat the steps above.

It is not possible to synchronize recurring appointments.

If you maintain attendees in an SAP Cloud for Customer appointment, you can send the meeting request as follows:

1. Ensure that the appointment is synchronized by repeating the steps above.
2. Open the appointment in IBM Lotus Notes and send the meeting request.

Adding Tasks for Synchronization

In IBM Lotus Notes, if you have contact information showing in the SAP Cloud for Customer sidebar, you can simply use drag and drop to associate a task with an opportunity, lead, or account listed under that contact.

If you wish to add a task for synchronization and do not have relevant contact information visible in the sidebar, use the following procedure.

1. In IBM Lotus Notes, select a task in your to-do list, right-click it, and add the task to SAP Cloud for Customer.
2. Add an account, opportunity, or lead as a reference.
3. Submit your changes.
   A task activity is created in SAP Cloud for Customer, based on information in the IBM Lotus Notes task.

You can open, create, or edit a task in SAP Cloud for Customer as well. For more information, see Activities [page 36].

If you change a task, the changes are automatically synchronized to when you save your changes.

Displaying Synchronized Appointments, Tasks, or E-Mails in SAP Cloud for Customer

1. In SAP Cloud for Customer, choose one of the following, depending on the activity:
   - *Activities* > *Appointments*
   - *Activities* > *Tasks*
   - *Activities* > *E-Mails*
2. The appointment, task, or e-mail that you synchronized from IBM Lotus Notes appears in SAP Cloud for Customer in the *Activities* view. If you added an account, opportunity, contact, or lead as a reference, it also appears in the item view for that item.

Deleting Appointments or Tasks

In the steps listed below, an appointment is used as an example, but the steps are similar for both appointments and tasks.

1. In IBM Lotus Notes, select the appointment or task that you want to delete.
2. Delete the appointment.

For appointments and tasks that were previously synchronized, the deletion is synchronized in both IBM Lotus Notes and SAP Cloud for Customer.

Creating Accounts or Contacts

1. In IBM Lotus Notes, under contacts, go to the SAP Cloud for Customer folder for contacts.
2. Create a new contact.
3. Enter the information for the contact person.
4. Save and close.

Accounts can be only created directly in SAP Cloud for Customer. However, once the account is created in the SAP Cloud for Customer, after the next synchronization, it appears in IBM Lotus Notes in the SAP Cloud for Customer folder for accounts.

The ability to synchronize accounts and contacts depends on your user authorizations, as well as your synchronization settings. If you have any questions or difficulties, contact your administrator.

Editing Settings for Synchronization

1. To change the settings for your synchronization updates for accounts, contacts, tasks, and appointments from IBM Lotus Notes to SAP Cloud for Customer, do the following:
   - In IBM Lotus Notes on the SAP Cloud for Customer sidebar, make the appropriate settings for contacts, appointments, and tasks.
   - Enable automatic synchronization and define a time period.

Removing E-Mails from SAP Cloud for Customer

You can remove an e-mail message from SAP Cloud for Customer (browser only) if you linked it to the SAP system originally. The e-mail is not deleted; it still exists in its original e-mail system from which it was synchronized with the SAP system (IBM Lotus Notes or Microsoft Outlook). The link to that e-mail is simply removed from SAP Cloud for Customer.

To remove e-mails from SAP Cloud for Customer, under *Activities*, hover on an e-mail and in the *Actions* column, choose *Remove*.

Uninstalling the Add-In for Lotus Notes

1. To uninstall the SAP Cloud for Customer sidebar plug-in from IBM Lotus Notes sidebar plug-in, use the application management function within IBM Lotus Notes.
2. Find the SAP Cloud for Customer add-in feature.
3. Uninstall the add-in.
4. Restart IBM Lotus Notes.
   The SAP Cloud for Customer add-in no longer appears as a sidebar in IBM Lotus Notes.

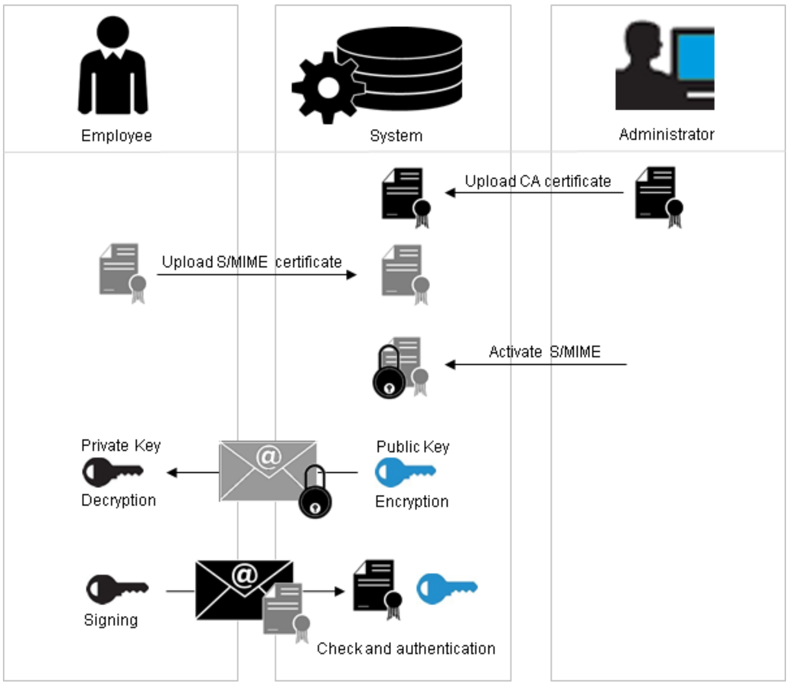
5.15.3 E-Mail Security

Overview

To increase e-mail security, your SAP solution enables you to decrypt incoming e-mails and check them for trustworthy signatures, as well as encrypt and sign outgoing e-mails. Outgoing e-mails are encrypted using the Secure/Multipurpose Internet Mail Extensions (S/MIME) standard.

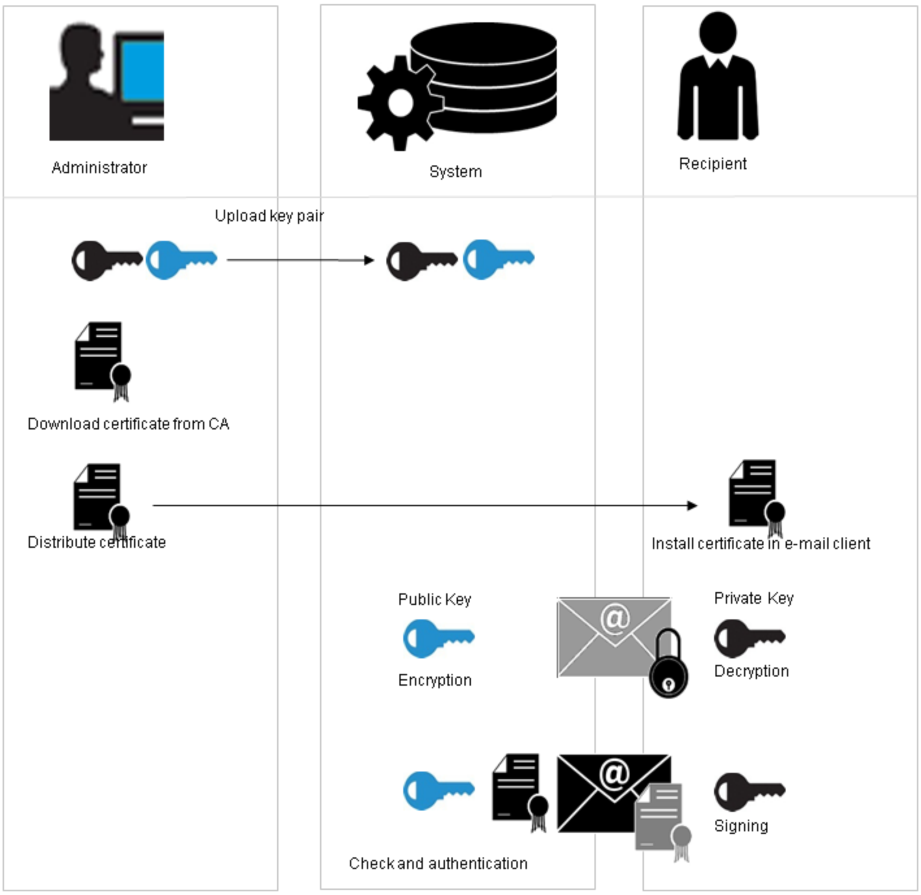
You can use this function for e-mail communication between your solution and your employees and your solution and your business partners, in e-mail scenarios provided by SAP. You can send encrypted e-mails to your users, (for example, to send them new passwords) or to business partners. You specify which e-mail scenarios you want to use and define settings for encryption and signatures for these scenarios in Business Configuration, in the E-Mail Encryption and Signature Check fine-tuning activity.

The following diagram illustrates how e-mail encryption and signature is set up for communication between your system and your employees:



S/MIME Configuration and Process Description

The following diagram illustrates how e-mail encryption and signature is set up for communication between your system and your e-mail recipients:



S/MIME Configuration and Process Description

Encrypting E-Mails Sent from Your System

Key pairs, which consist of a public key and a private key, are used to encrypt and decrypt e-mails. The sender uses the recipient's public key to encrypt e-mails sent to the recipient and the recipient uses his or her private key to decrypt these e-mails. Therefore, before outgoing e-mails can be encrypted, the recipient's public key must be uploaded to the system. This can be done in the following ways:

- The administrator uploads it manually. This option is valid for both employees and for business partners.
- The employee uploads it manually. This option is valid for employees only.
- The employee sends a signed e-mail (where the signature contains the S/MIME certificate) to the central security e-mail address. This option is valid for employees only.
  Note that before an employee sends a signed e-mail containing the S/MIME certificate to the central security e-mail address, you have to upload the certificate of the trusted Certification Authority (CA) that has also issued the employee's certificate. Otherwise, the system does not accept the employee's public key.

> You can use only one S/MIME certificate for each employee. That is, if the employee uploads a second S/MIME certificate, the system replaces the old one.

Receiving Encrypted E-Mails Sent to Your System

You can define in an e-mail scenario that you only want to receive encrypted e-mails from a sender. For the sender to be able to send you encrypted e-mails, he or she must have your system's certificate. Therefore, you must download this certificate and distribute it to the relevant employees and business partners.

Checking the Signature of E-Mails Sent to Your System

The sender signs e-mails using his or her private key and the recipient can then verify the signature using the public key.

To verify the signature of incoming e-mails, you have to upload the certificate of a trusted CA into your system. You have to do this for the central security e-mail address and for all system e-mail addresses to which employees and business partners can send an e-mail. The S/MIME certificate of the sender must be issued by the same CA. When receiving a signed e-mail, the system verifies whether the certificate in the e-mail is issued by a trusted CA, checks whether the signature is valid, and, if the certificate has been assigned to an employee, authenticates the employee's user ID by means of the S/MIME certificate. If the e-mail has been sent by a business partner who does not have a user in the system, the e-mail is processed by the system using a technical user. If the verification fails, the system rejects the e-mail and informs the sender.

Only trust those CAs that verify the e-mail address of the sender. Otherwise other persons could become the owner of a certificate that has been issued by the same CA and contains a valid e-mail address.

Signing E-Mails Sent from Your System

To sign e-mails sent from your system's standard sender address (DoNotReply@<systemdomain>) a key pair is automatically created and signed by the SAP Passport CA for this e-mail address.

E-Mail Recipients: To be able to verify the signatures of e-mails sent from this address, the recipients of these e-mails need to install the corresponding CA certificate in their e-mails clients. For the standard sender address you can download the certificate from the SAP Passport CA. For external key pairs, you can get the certificate from the signing CA.

See Also

Configuration: Load Certificates and Activate Signing and Encryption for E-Mails

Configuration: E-Mail Encryption and Signature Check

Process-Integrated Output Settings

5.15.4 Uploading New E-Mail Security Certificates

When your system administrator set up your cloud solution, he or she uploaded an e-mail security certificate for you. This certificate is also called a Secure/Multipurpose Internet E-Mail Extension (S/MIME) certificate, and it is necessary for the system to encrypt outgoing e-mails.

In case your certificate becomes invalid or expires, you may want to upload a new certificate yourself.

If you have any difficulties, consult your system administrator.

Tasks

Saving Your New Certificate

You can use your internet browser to download and save the latest certificate from the trusted Certification Authority (CA).

For example, in Microsoft Internet Explorer® 9, download the certificate as follows:

1. Go to the settings for internet options.
2. As part of content, go to the list of certificates and choose the relevant one.
3. In the details for that certificate, save a copy to file with file format *Base-64 encoded X.509*.

Uploading Your New Certificate

1. In SAP Cloud for Customer, under *Personalize* > *My Settings*, choose *Manage Certificates*.
2. Choose *Upload S/MIME Certificate*.
   A separate window opens, displaying the files in your system.
3. Direct the system to the place you saved your updated certificate in the last step and choose Open.

See Also

E-Mail Security [page 52]

5.16 Working with Lists

Tasks

Filtering Lists

You can narrow down a list by searching or by using the following filtering or query options:

- Predefined filters
  For some lists, you can select a predefined filter from a drop-down list. These filters are specific to the content in each list, and will allow you to filter your items or your team's items.
- Show Filter
  For some lists, you may select additional options by doing the following:
  1. At the top of a list, choose .
  2. Narrow the list by choosing the appropriate categories, which appear above the list.
     The number that follows a category name is the number of entries in that category.
  3. Select an item from the list for more details. To close the filter without selecting an item, choose .
- Advanced Filter
  For some lists, you may select additional options in the filter bar by doing the following:

1. At the top of a list, choose .
2. Make the appropriate selections. For more options, you may select .
3. Select an item for more details.
   To close the filter without selecting an item, choose .

   To set up a filter to see obsolete accounts:
   1. Navigate to the accounts list.
   2. Choose .
   3. Under status, choose .
   4. Set the option as *Equal To*, and the value as *Obsolete*.
   5. If necessary, deselect the *But Exclude* box.

From the filter or advanced filter view, you can save or organize your filters or queries for future use. Saved queries appear in the drop-down list of filters. You can also set a query as the default so that it will automatically filter the list. Organize your queries to delete a saved query or to set a new default query.

Sorting Lists

- You can sort a list by selecting at the top of a list, or by choosing a column header.
- When you make a selection, an arrow pointing up appears, and the results appear in alphabetical order.
- Select the column again to see the list in descending order. An arrow pointing down appears, and the results appear in reverse alphabetical order.
- If you are sorting with the column header, you can sort multiple columns at once by holding down the `Shift` key as you choose. The direction of the arrow indicates the sort order, as described above.

5.17 Processing Inbound Phone Calls

Overview

Upon installing the Computer Telephony Integration (CTI) client adapter provided by SAP, your solution will automatically generate phone activities that capture customer information for incoming calls, provided that your solution is enabled to contain the *Live Activity* pane.

Prerequisites

You must have third-party telephony software installed.

Tasks

Installing the CTI Client Adapter for Telephony Integration

To allow your solution to automatically generate phone activities, install the CTI client adapter as follows:

1. In SAP Cloud for Customer, choose *Downloads*.
2. Download the *CTI Client Adapter* as follows:

    1. Hover over *CTI Client Adapter*, then click Download.
    2. Click Run when prompted.
    3. Click Yes when asked if you want the solution to publish changes on your computer.
    4. Complete the steps in the setup wizard.
       Upon completing the installation steps, the adapter will be installed on your computer, and a shortcut will be visible on your desktop.
3. Right-click the shortcut to the adapter on your desktop. Open the *Compatibility* menu. Enable the selection *Run the program as an administrator*.

Adding Notes to Current Phone Call Activity

If you solution is enabled to contain the *Live Activity* pane, then you can view the details of your current phone call and add notes to the activity.

> To see current phone call details, the *CTI Client Adapter* installed on your desktop must be running. You need to run the adapter before you open *SAP Cloud for Customer*.

1. During a phone call, click *Live Activity*.
   The details of your current call will be populated in the pane:
   - *Call Information* contains details about the current call.
   - *Customers* contains detailed information about the customer on the call. You can also search for customer information.
   - *Tickets* contains a list of tickets related to the current customer. You can also search for tickets.
2. Enter your comments in *Notes* and save your changes.
   To see the notes you added to the activity, choose *Activities* > *Phone Calls*, then open the phone call activity.
   Your comments are visible in *Notes*.

Converting a Phone Activity to a Ticket

You can convert a phone activity to a ticket if your solution is scoped to use Social and Service features.

1. Choose *Activities* > *Phone Calls*.
2. Select the phone activity you want to convert from the list.
3. Select *Actions* and then *Convert to New Ticket*.
   You will see a ticket in the *Queue* that contains the information from the phone activity.

5.18 Search

5.18.1 Working with Lists

Tasks

Filtering Lists

You can narrow down a list by searching or by using the following filtering or query options:

- Predefined filters
  For some lists, you can select a predefined filter from a drop-down list. These filters are specific to the content in each list, and will allow you to filter your items or your team's items.
- Show Filter
  For some lists, you may select additional options by doing the following:
  1. At the top of a list, choose .
  2. Narrow the list by choosing the appropriate categories, which appear above the list.
     The number that follows a category name is the number of entries in that category.
  3. Select an item from the list for more details. To close the filter without selecting an item, choose .
- Advanced Filter
  For some lists, you may select additional options in the filter bar by doing the following:
  1. At the top of a list, choose .
  2. Make the appropriate selections. For more options, you may select .
  3. Select an item for more details.
     To close the filter without selecting an item, choose .

     To set up a filter to see obsolete accounts:
     1. Navigate to the accounts list.
     2. Choose .
     3. Under status, choose .
     4. Set the option as *Equal To*, and the value as *Obsolete*.
     5. If necessary, deselect the *But Exclude* box.

From the filter or advanced filter view, you can save or organize your filters or queries for future use. Saved queries appear in the drop-down list of filters. You can also set a query as the default so that it will automatically filter the list. Organize your queries to delete a saved query or to set a new default query.

Sorting Lists

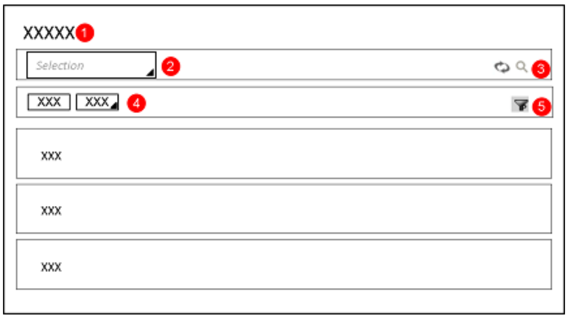
- You can sort a list by selecting at the top of a list, or by choosing a column header.
- When you make a selection, an arrow pointing up appears, and the results appear in alphabetical order.
- Select the column again to see the list in descending order. An arrow pointing down appears, and the results appear in reverse alphabetical order.
- If you are sorting with the column header, you can sort multiple columns at once by holding down the `Shift` key as you choose. The direction of the arrow indicates the sort order, as described above.

5.18.2 About Worklists

Worklists are tables that contain documents and tasks. The worklist provides a summarized view of all your data records. You can use the search and filter options to locate the records you need. You can also perform actions such as open, edit, create, delete, or release.

Depending on the solution you are using, you might find two types of worklists: worklist and the new worklist.

Worklist



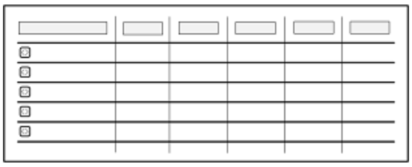
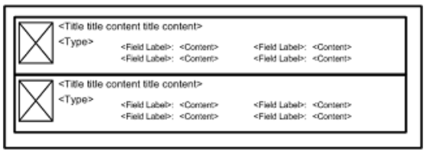
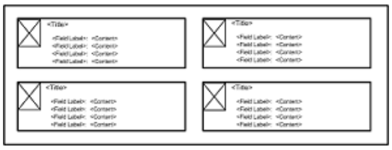
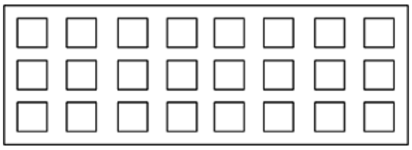
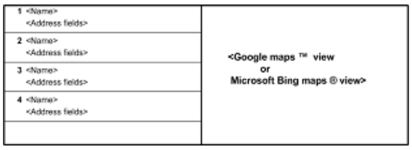
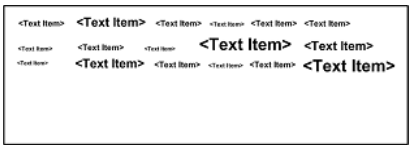
Worklist Layout

1. Title of the worklist.
2. *Show* dropdown listbox: You choose a predefined query from the dropdown list, and get the selected records in the table. For example, you choose *My Sales Orders* from the Show dropdown listbox, and get the sales orders that are created by you.
3. Refresh and Search: You refresh the table to get the latest data records. You can also search within the worklist to find the record you need.
4. Action: You can preform actions such as view, edit, create, preview in PDF version, export to Microsoft Excel®. The actions that you can perform here are determined by the application.
5. Filter: You can use filters to find data records that fulfill the search criteria you define.

The New Worklist

The New Worklist Layout

1. Title of the worklist.
2. Action: From here you can perform actions that are not related to any items from the table. For example, you can create a new record.
3. View: You can have different views on the records in the worklist. The types of views that you can choose from depends on the content of the worklist. Here is an overview of all views:

List View	 List View	A classical table is displayed.
Card View	 Card View	The card view shows the data in four columns, where the first column is an image.
Tile View	 Tile View	The tile view shows the data in two columns, where the first column is an image.
Thumbnail View	 Thumbnail View	The thumbnail view shows an image and the title of the record below the image.
Map View	 Map View	The map view supports Google Maps® or Microsoft Bing®. The map area shows Google map or Bing map view for the address in the data record.
Cloud View	 Cloud View	The cloud view shows tags in different sizes. Each tag is shown only once. The more a certain word is tagged, the bigger the font size of the word is in the cloud view.

4. Sort: you can sort the data records by certain key fields.
5. *Show* dropdown listbox: You choose a predefined query from the dropdown list, and get the selected records in the table. For example, you choose *My Sales Orders* from the Show dropdown listbox, and get the sales orders that are created by you.
6. Filter: You can use filters to find data records that fulfill the search criteria you define.

7. Search: You can also search within the worklist to find the record you need.
8. Action: From here you can perform actions that are related to this particular data record. For example, you can view, edit, or release the document. You can also flag or tag the record. In the List view, place your mouse over the *Actions* column of the data record, and the available actions appears as an overlay. The actions that you can perform here are determined by the application.

Using Filters

You can use filters in a worklist to only show those data records that fulfill the search criteria you define in the filter row.

To filter the data in the worklist, you can follow the following steps:

1. To define a filter using the filter row, in the toolbar above the list, choose the filter icon with the *Show Filter Row* tool tip. The filter row is displayed as the first row in the list.
2. Define the appropriate filter criteria the in the relevant columns. Use the appropriate filter operators.
3. To apply the filter or filters to the list, press `Enter` or choose the filter icon at the beginning of the filter row with the *Apply Filter* tool tip.
   The system searches across all available data records that are available in the worklist.
4. To delete specific filters, delete the filter criteria for the column in the filter row and press `Enter` or choose the filter icon at the beginning of the filter row with the *Filter Button* tool tip.
5. To hide the filter row and thereby delete all filters in it, in the toolbar above the list, choose the filter icon with the *Delete Filter and Close Filter Row* tool tip.

For more information about the available filter operators, see here [page 63].

To get the filter results more quickly in a worklist, we recommend using the advanced search function.

Using Basic Search

To perform a basic search, enter a value, for example, an ID or description, in the search input field. The system searches the main fields for data that matches the value you entered. The search is case-independent, and you can use wildcard characters (such as an asterisk or question mark) in your search.

We recommend that you use the basic search.

Using Advanced Search

You can use the advance search to specify your search in detail.

To open the advanced search, click *Advanced* next to the search input field. Enter the value in the relevant advanced search input field(s). The advanced search fields vary according to document type or task.

To define a single field in more detail, or to enter multiple search values per field, you can use more options. More options are available to the right of the advanced search field by clicking the icon with the *More Options* tool tip.

Using *More Options*, you can use the following operators to define your search further:

- Equal To
- Contains Pattern
- Greater Than
- Greater Than or Equal To
- Less Than
- Less Than or Equal To
- Between

You can also exclude values based on the same operators.

If you use certain search criteria frequently, you can save your search variant as a query. To save your search criteria as a variant, enter your search criteria, perform the search, and then click Save (Query), and enter a query name. By clicking Organize (Queries), you can either organize your personal queries or delete them.

5.18.3 Enterprise Search

Enterprise Search allows you to search through the entire SAP solution.

Basic Search

Using the basic search, you can search for a term without specifying any details. You can search in all categories or you specify a specific category.

1. Click the *Enterprise Search* icon in the Taskbar.
2. Narrow down your search to a specific category by selecting the category in the dropdown list. If you want to search through the entire system, select *All Categories*.
3. Enter your search terms then click Go or press `Enter`.
   Search results are presented in the *Search* window.

   You can use the asterisk (*) symbol to perform a wildcard search.
   For example, searching **ell** returns terms such as well and hello.

4. Click the link of the item you want to view.

Advanced Search

Advanced Enterprise Search is available in the *Search* window that results from performing a basic Enterprise Search.

1. Click *Advanced* in the *Search* window.
2. Narrow down your search to a specific category by selecting the category in the dropdown list. If you want to search through the entire system, select *All Categories*.
3. Enter additional values in the input fields to narrow your search results. Note that the input fields available in your search pane might vary depending on your application.
   The table below shows how each field will affect your search:

Field Name	Search Effect
Changed On: ... To:	Displays items edited between the specified dates.
Owner	Displays items that belong to the specified owner.
ID:	Displays items with the specified ID, for example, message ID or employee ID.
Description:	Displays items that match the specified item description.
Tag Name:	Displays items tagged with the specified name.

4. Click Go or press `Enter` to initiate the search.
   The solution returns a list of items based on your search criteria.

5. Click *Reset* to clear your search criteria.

5.18.4 Filter Operators

Available Filter Operators

The search syntax supports the following operators:

Filter Criteria	Operator	Example	Result Examples	Not Found
Display only those result records that contain the value [comparison value]	*	*2*	2 123 999 123 999	111
Display only those result records that start with [comparison value]	No operator or =	123 = 123	123 123 ABC	123ABC ABC123 ABC 123
Display only those result records that contain a value that is greater than [comparison value]	>	> 123.00	123.01 124.00 54684884.89	2.00 123.00 -124.00
Display only those result records that contain a value that is less than [comparison value]	<	< 123.00	122.90 -123.00	123.00
Display only those result records that contain a value that is either greater than or equal to [comparison value]	>=	>= 123.00	123.00 123.01	>= 123.00
Display only those result records that contain a value that is either less than or equal to [comparison value]	<=	<= 123.00	123.00 122.99 -124.00	<= 123.01
Display only those result records that contain any value, but not [comparison value]	!	! 123.00	122.00 123.01 124.00	123.00
Display only those result records that contain any value between [lower limit] and [upper limit] (including these limit values)	-	100.00 – 123.00	100.00 110.77 123.00	99.99 123.01 -110.00
Display only those result records that contain any value below [lower limit] or above [upper limit], but no value in between (and also not the limit values)	! and -	! 100.00 – 123.00	99.99 123.01 -110.00	100.00 110.77 123.00
Display only those result records that fulfill at least one of the filter criteria	;	A*; X	A A BCD ABCD X	XA X A X ABCD X A BCD

If you want to use a character string as a filter and this character string contains one of the special characters listed above (such as C-1025), you need to place the entire character string in quotation marks (`"C-1025"`, for example).

You want to identify all data records in the current column that end with ouse, such as House and Mouse. To do this, you enter `*ouse` as the comparison value.

Filter Operators for Checkboxes

For worklists that contain checkboxes, the following operators are available:

Filter Criteria	Operator
Display only those result records for which the checkbox is selected	yes
Display only those result records for which the checkbox is not selected	no

5.19 Library

The *Library* allows you to store documents, pictures, or other files directly in the solution. Here you can view, edit, or delete files.

You can also easily share files with your colleagues to collaborate with them. Version tracking and exclusive editing rights using a check in/check out policy ensure that the files are always up to date, and searching and linking functions allow you to easily find and share your files with colleagues.

Tasks

Add a Document

1. From the *Library*, choose *Actions* › *Add*.
   The *Add Document* window appears.
2. Browse to the file location.
   If necessary, change the automatically populated *Title*.
3. Select *Enable Versioning* if you want to track the history of the document.

   When versioning is enabled, a major revision is represented by an increase of the first digit in the version number of the document. Within a major version of a document, there can be several minor versions, which are represented by the second digit in the version number.
4. Save your entries.

You can also add a document by choosing the *Add Document* option from the toolbar.

Display a Document

- From the *Library*, rest your cursor on the title of the document.
  The information regarding the document is displayed.
  Choose the title from the list or in the window.
  The *Document* details window opens.
- In the *Header View*, you have an overview of the properties of the document.
- *Overview* gives you an overview of the recent updates of the documents as well as a table with version information.
- *Feed* provides you with information regarding the latest feed updates.
- *Versions* provides an overview of the versions of the document.

Edit a Document

1. From the *Library*, highlight the document you want to edit.
2. Choose *Actions* > *Check Out*.
   You can now open, edit, and save the document.
3. After editing, upload a new version of the document by choosing *Actions* > *Check In* and browsing to the updated file.

Search for a Document

1. From the *Library*, choose the *Show Filter* icon.
2. Select your parameters in the lists displayed, or enter your search terms.
   The system displays the documents matching your criteria.
3. Choose *Advanced* for advanced search options.

5.20 Using the SAP Add-In for Microsoft Excel®

Overview

The SAP Add-In for Microsoft Excel provides the integration of Microsoft Excel with an SAP system. Depending on where you open the add-in for Microsoft Excel, different functions are available.

You can use the SAP Add-In for Microsoft Excel for the following purposes:

- To create business data (administrators only)
- To analyze report data

Prerequisites

To use Microsoft Excel with your solution, ensure that the Add-In for Microsoft Excel is correctly installed, as follows:

1. Choose *Downloads*, then download the *Add-In for Microsoft Excel®*.
2. Run the installation and setup wizards that appear.
3. Open Microsoft Excel, then ensure that the add-in is active. If needed, consult the documentation in Microsoft Excel for instructions on how to activate add-ins.
4. Ensure that your Web browser is set to prompt automatically for file downloads. If needed, consult the documentation in your Web browser for additional information.

Using Microsoft Excel to Create Business Data (Administrators)

Administrators can use the SAP Add-In for Microsoft Excel to create objects, such as an account or a lead, by entering them in a predefined Microsoft Excel template and uploading them to the SAP system.

For more information about the application-specific business data, see Create Business Data Using Microsoft Excel.

> If you can log on to the SAP system in a Web browser as normal, but cannot log on to the system from the Add-In for Microsoft Excel, ask your administrator to check your proxy server settings to ensure that the connection to the system is not blocked.

Using Microsoft Excel to Analyze Report and Plan Data

You can use the SAP Add-In for Microsoft Excel to execute ad hoc analyses, create plan data, and define sales targets. Note that the functions available to you depend on your role.

For more information about using Microsoft Excel for the specific purposes listed below, see the following:

Sales Users

- Working with Reports in Microsoft Excel
- Working with Sales Planning Data [page 122]

Administrators

- Design Reports Quick Guide
- Sales Planning [page 102]

6 Marketing Features

6.1 Campaigns

You can create e-mail, fax, phone call, and letter campaigns for target groups that you have defined. You can classify responses that you want to capture as response options for each campaign. The response options can represent customers' sentiment or interest.

Once you have created the campaign, you can export it as a CSV file that includes the target group members and their contact information. You can distribute this file, for example, to a marketing agency to contact the target group members, and use the file to track campaign responses.

> Only target group members who meet the following criteria are added to the export file:
> - Member can be contacted (contact permission has not been denied)
> - Member status is not obsolete or blocked
> - Member's address information is available. For example, if you launch an e-mail campaign, all exported target group members must have an e-mail address in their contact information.

Tasks

Creating Campaigns

1. Choose *Marketing* > *Campaigns* > *New*.

   > You can also create a campaign directly from a target group by choosing *Actions* > *New Campaign*. The target group from which you created the campaign is assigned automatically.

2. Enter the name and type of campaign, the start and end dates, and the target group you want to assign to the campaign and then save your entries.
   The campaign is created with status *Planned*.
3. Enter any additional information that you want to save in your campaign.
   For example, you can add attachments to your campaign and you can assign response options.

   > You can only assign response options to a campaign that has not yet been executed in status *Planned*.

Exporting Campaigns

1. Open the campaign you want to export and choose *Actions* > *Execute*.
   A CSV file is generated containing all target group members that can be contacted with their address information and a unique ID.
2. Choose whether you would like to open the document directly or save it locally.
   The information in the export file can be used to contact the target group members.

Defining Response Options for Campaigns

If you want to classify responses that you capture from campaigns, a marketing administrator can create response options that can be assigned to campaigns. A response option can be assigned a positive, negative, or neutral classification, for example to capture customers' sentiment or interest.

1. Choose *Marketing* > *Response Options* > *New*.
2. Enter a name for the response option and select a classification.
3. Save your entries.
   The response option is saved with status *Active* and can be assigned to campaigns that have not yet been executed.

See Also

Executing Direct E-Mail Campaigns [page 68]

6.2 Executing Direct E-Mail Campaigns

With the campaign type *Direct E-Mail* you can send personalized HTML e-mail messages in marketing campaigns directly from the SAP Cloud for Customer system while the campaign is executed. Each account or contact of the assigned target group will receive a personalized e-mail messages if he or she is allowed to be contacted and has a valid e-mail address. The execution can be scheduled to be started immediately or in the future at a certain date and time. For this personalization, HTML e-mail templates are used. A template contains the mail content and placeholders, such as the formatted name of the account or contact. These placeholders will be filled with the information of the contacted account or contact while the e-mail is created and before it is sent.

Once you launched a direct e-mail campaign, you can track whether or not the customer opens the e-mail message on his or her computer and shows the key figures on the *Overview* tab.

Prerequisites

Direct e-mail campaigns are enabled in the system.

Tasks

Creating an E-Mail Template

For more information, see E-Mail Templates.

Creating and Executing a Direct E-Mail Campaign

1. Choose *Marketing* > *Campaigns* > *New*.

   > You can also create a campaign directly from a target group by choosing *Actions* > *New Campaign*. The target group from which you created the campaign is assigned automatically.

2. Enter the name and type *Direct E-Mail*, the start and end dates, the target group you want to assign to the campaign, an e-mail subject, and add the template and then save your entries.
   The language for the first template is pre-set with your logon language but you can change this after the upload.
   The campaign is created with status *Planned*.
3. Enter any additional information that is required for your campaign, such as the senders e-mail address and save again.
4. You can now execute the campaign by clicking Actions > *Execute*.
   The *Schedule Execution* pop-up opens.
5. Here you can either enter a date and time for the future execution in case you do not want to send out the e-mails immediately, or you can start the campaign immediately and the system triggers the sending of the e-mails.
6. Then click OK.
   The status of the campaign changes to *Active* and, on the *General* tab, you can see the execution status. You can obtain the most current execution status by clicking on the refresh icon in the status line. This might be helpful in case you want to check if the campaign is running or even finished in case of an immediate execution.

   > If a campaign execution has the status *Finished with Errors* or *Failed*, it can be restarted. This means you can schedule it again. If a restarted campaign is executed, it will sent e-mail only to those accounts that have not been processed before. Accounts that have been processed during a previous execution and that cannot be contacted, for example, because they have no e-mail address, will not be processed again. The campaign has already created a tracking record for such accounts and they will be shown in campaign on the *Execution Details* tab where the *Members Not Contacted* are listed.
   > If a campaign execution has the status *Finished with Errors* or *Failed*, you can click on the hyperlink of this status in order to open the application log in a separate window. It contains detailed messages explaining the reason why the execution was not successful.

Monitoring the Campaign

After you executed the campaign you can monitor the e-mail penetration on the *Overview* tab:

- Under the *Response Results* you see, how effective your campaign was by the numbers of follow-up leads, opportunities or quotes.
- Under *E-Mail Metrics* you find the numbers about the send-out messages, such as how many messages are sent, opened, and how many links are clicked.

Sending Test E-mail

To test your campaign, click *Actions* > *Send Test E-Mail*, enter at least the e-mail address of the recipient, for example, your own e-mail address, and click OK. For each template assigned to the campaign, exactly one test e-mail will be created and sent. If you use placeholders in the e-mail template, you can enter an account and a contact person. In this case, the placeholders in the e-mail will be filled with the corresponding values of the account and contact person.

Note that the system can only confirm that the e-mail has been sent but not that it has been received by the sender.

Adding E-mail Templates for Additional Languages

1. To add an additional template, go to the *E-Mail Templates* tab and click Add.
2. Select a language suitable to the template you want to upload, enter an e-mail subject in the corresponding language and click Browse.
3. Select the prepared e-mail template from your hard drive and click Open and then OK.

The system uploads the template and checks the HTML code for viruses, HTML syntax, code page, and the used placeholders. In case of any errors, the system does not upload the file.

4. Save your campaign.

> You can assign several e-mail templates to your campaign, but only one for each language. During the campaign execution, the communication language of the target group member (depending on the type of the member, the data is derived from the communication data of the corporate account, the person data of the private account or the person data of the corporate account's contact person) is taken in order to use the corresponding e-mail template. For example, an account has the communication language German and so the German e-mail template is used to create the e-mail. In case no communication language is selected, the default e-mail template is used. Also some place holders such as title and form of address are taken language-dependent.

Troubleshooting

- I want to upload an e-mail template but got error messages.
  The uploaded file is checked for viruses, HTML syntax, code page, and the used placeholders. In case of any errors, the system does not upload the file but shows error messages. You have to correct the file content by a 3rd party software and upload the corrected file again.
- Why does the execution status of the campaign remain in Scheduled or Running although the planned start date and time has been reached?
  Once the campaign is started, the status will be updated by the system automatically. But there can be different reasons why this status update does not happen:
  - Due to high workload on the server, the campaign cannot be started at the planned start date and time. It will be started once the system has again free resources.
  - The campaign has been started but it failed. One reason, for example, can be a server shutdown. Once a day, the status of the campaign is corrected automatically. This means the next day you should see that the status has been changed to *Failed*.
- What to do if a campaign failed?
  Restart the failed campaign again.
- Why did the execution of the campaign end with status Finished with Errors?
  The campaign has been started successfully, but it could not create and send all personalized e-mail. Therefore it set the status of the campaign to *Finished with Errors*. One reason could be that the campaign execution was scheduled for a future date and time but the campaign was locked by another user at this date and time.
  You can click on the hyperlink of the execution status and open an application log with detailed messages. Analyze the messages and restart the failed campaign again.
- The campaign execution has been Finished Successfully. On the tab “Execution Details” the list “Members Contacted” shows all successfully contacted members of the target group. After some minutes or hours a successfully contacted member vanished.
  The system has created and sent a personalized e-mail to the mailbox of this member. But this mailbox does not exist. The mail server received a so-called *Delivery Status Notification*.
  This notification is processed automatically and updated the campaign information of the *Members Contacted* list. The member has been moved to the list *Members Not Contacted* and a corresponding reason has been set.
  In addition, the indicator *E-Mail Invalid* has been set for the e-mail address of this member. You can see this indicator in the corresponding account or contact person master data. Here you can correct the e-mail address and remove this indicator again. In a future campaign, this e-mail address would be used again and the campaign execution will send a personalized e-mail to this mailbox.

If the indicator is not removed, a future campaign would filter out this e-mail address. It would appear in the *Members Not Contacted* list with a corresponding reason.

See Also

How-To Video: Managing E-Mail Campaigns

6.3 Target Groups

Target groups are used to segment your market and to target the right customers or prospects for each campaign. You create target groups with members from your existing customer and prospect database or from tickets, if you have service features enabled for your solution.

You can use an e-mail blast to send mass e-mails to a target group. A subset of the campaign tracking options is available for e-mail blasts.

> To send an e-mail blast, you must first do the following:
> - Ensure that your administrator has set up mass e-mail in your system. For more information, see Activation of Mass E-Mail.
> - Save an e-mail template on your local drive. For more information, see E-Mail Templates.

Tasks

Creating Target Groups from Marketing

1. To create a new target group, choose *Marketing* > *Target Groups* > *New*.
2. Enter the target group name and save your entries.
   The target group is created with status *Active*. You can use the active target group in your marketing campaigns.

   > If you do not want the target group to be used immediately in campaigns, you can change the status from the *Actions* menu.

Creating Target Groups from Tickets

1. To create a new target group from tickets, choose either *Customer Service* > *Queue* or *Customer Service* > *Tickets*.
2. Choose the tickets you want to use to create the group.
3. Choose *Actions* > *Create Target Group*.
4. Enter the target group name and save your entries.
   The target group is created with status *Active*. You can use the active target group to e-mail customers that have an e-mail address in their account.

If you do not want the target group to be used immediately in campaigns, you can change the status from the *Actions* menu.

Editing Target Group Members

1. To add members to the target group, open the target group and choose *Members* > *New*.
2. Enter individual accounts and contacts or select from many accounts and contacts and then choose *OK*. The members are added to the target group.
3. To remove members, select the members in the list, click the actions icon, and then choose *Remove Selected Members*.
4. To check whether target group members have contact information, select a member from the list, click the actions icon, and then choose *Check Contact Info*.
5. Select the type of contact information you want to check and then choose *OK*. The *Addressability* status for the target group member changes depending on whether the selected contact information exists.
6. To export the target group member list to a Microsoft Excel ® file, click the actions icon and then choose *Export to Microsoft Excel ®*.

6.4 Marketing Leads

Under *Marketing* > *Marketing Leads*, you can create marketing leads to record raw data that is derived from campaigns, trade shows, and other marketing activities. You can also edit marketing leads, and convert marketing leads to follow-on items — such as sales leads, opportunities, or accounts and contacts — to drive sales activity. To this end, you can also perform the following optional actions:

- Specify the source and campaign of your marketing leads
- Classify marketing leads according to a particular interest
- Qualify marketing leads by applicable levels — for example, as cold, warm, or hot
- Track and analyze the success of your marketing leads over a specified time frame
- Add products to marketing leads

Tasks

Creating Marketing Leads

1. Choose *Marketing* > *Marketing Leads* > *New*.
2. Enter the pertinent information about the marketing lead.
3. Save your entries.

Editing Marketing Leads

1. Open the marketing lead of interest.
2. Position the cursor over the information you want to edit.

As you move the cursor over an editable field, the background changes to a different color. When you click a field, you enter edit mode.

3. Edit the marketing lead as required, then save your entries.

> You cannot edit marketing leads that have been converted to follow-on items, such as sales leads or opportunities.

Assigning Owners to Marketing Leads Automatically

If your system administrator has activated lead assignment in your system, owners are automatically assigned for new marketing leads only. For more information about activating lead assignment, see Defining Rules for Marketing Lead Assignment.

Assigning Owners to Marketing Leads Manually

1. Select one or more marketing leads.
2. Choose *Actions* > *Route Selected Leads*.
   The system uses the rules defined by the system administrator to assign owners to these marketing leads. The owner that is assigned this way overrides any previous owner information for a lead.

Assigning Products to Marketing Leads

1. Choose *Marketing* > *Marketing Leads*.
2. Open the desired marketing lead.
3. Select the *Products* tab.
4. Open the *Products* pane or the *Shelf*.
5. Drag the desired product icon from the *Products* pane or the *Shelf* and drop it onto the *Products* table.

Removing Products from Marketing Leads

1. Choose *Marketing* > *Marketing Leads*.
2. Open the desired marketing lead.
3. Select the *Products* tab.
4. Find the product to be removed.
5. Choose the *Remove* icon in the *Actions* column next to the product you wish to remove.

Converting Marketing Leads

When you convert a marketing lead to an opportunity, it remains in the system as a record. You can further process, as required, any follow-on items that arise from the marketing lead, but you cannot delete the marketing lead once it has been converted.

To convert a marketing lead to another item, proceed as follows:

1. Open the marketing lead of interest.
2. On the marketing lead details screen, choose one of the following:
   - *Actions* > *Convert to Sales Lead*
   - *Actions* > *Convert to Opportunity*
   - *Actions* > *Convert to Account and Contact*
3. Edit the item that is to result from this marketing lead, then save your entries.

> If your administrator has scoped the solution to check for potential duplicate accounts and contacts, then select Check for Duplicates before you save the account and contact, to ensure that its information is unique.
> If the information you enter is found to resemble the information of an existing account or contact, then the solution notifies you that potential duplicate accounts or contacts were found.

In response, the follow-on item of the converted marketing lead appears in the *Converted to* column.

See Also

Sales Leads [page 82]
Opportunities [page 84]
Accounts [page 75]

6.5 VIDEO: Working with Leads

Video

Working with Leads (4m 48s)

Find out how to create and qualify leads, and how to convert leads to other items — such as opportunities— to drive sales activity.

7 Sales Features

7.1 VIDEO: Start Here for Sales

Video

Start Here for Sales (2m 56s)

Find out how to walk through the sales cycle: starting with an assigned lead, converting it to an opportunity, and finally reporting on the closed deal.

7.2 Accounts

On the *Accounts* tab, you can display existing accounts, create new accounts, and set account statuses. You can also display account details, review additional data, and rename and edit accounts, as required, and, if you are authorized to do so, assign employees to an account team.

Once you have created an account, it can no longer be deleted. You can, however, set its status as *Obsolete*.

Tasks

Creating Accounts

1. Choose *Customers* > *Accounts*.
2. Choose *New*.
3. Enter the *Name* and *Country* of the account, then specify its *City*.
   If desired, you also may enter the account's Web site, or specify its classification.
4. Save your entries.

   If your administrator has configured the solution to check for potential duplicate accounts, then select Check for Duplicates, before you save the account, to ensure that its information is unique.
   If the information you enter is found to resemble the information of an existing account, then the solution notifies you that potential duplicate accounts were found.

   For a description of the available save options, see Save Options.

You may designate only one primary contact per account. Secondary contacts cannot be specified.

If Territory Management has been activated, then an employee who is not defined to be a territory owner cannot be defined as the owner of an account.

Editing Accounts

You can edit accounts from the *Account* item header, as follows:

1. Position the cursor over the information to be edited. For example, if you want to rename the account, position the cursor over the *Name* field.
   As you move the cursor over an editable field, the background changes to a different color. When you click a field, you enter edit mode.
2. Change the desired entries.
   Depending on the field, use the drop-down menu or automatic search to choose an entry.
3. Save your entries.
   For a description of the available save options, see Save Options.

From the item header, you can only edit the current main address of an account.

To edit an address other than the current main address, or to designate a different address as the main address, choose the *Addresses* tab.

Choosing Account Filters

Accounts are displayed in one of three standard filters, described below:

Standard Account Filters

Filter	Accounts Displayed
All	All accounts for which no owner or account team is defined, plus all accounts that you are authorized to access.
My Accounts	All accounts for which you are assigned as a member of the account team.
My Team's Accounts	All accounts for which you are assigned as a member of the account team, and, if you are a sales manager, all accounts for which any subordinate of yours is assigned as a member of the account team.

The standard filters above do not include obsolete accounts. To view obsolete accounts, create and save a new filter. For more information, see Working with Lists [page 55].

The default filter is *My Accounts*. You can modify the range of accounts displayed by selecting among these filters.

Setting Account Status

From the account details, use the *Actions* menu to choose the following applicable status:

- Choose *Actions* > *Set as Active* to change the account status to Active.
- Choose *Actions* > *Block* to change the account status to Blocked, which will exclude the account from subsequent search results. By blocking an account, you also prevent future opportunities, activities and other items from being assigned to it.
- Choose *Actions* > *Set as Obsolete* to change the account status to Obsolete. By setting an account as obsolete, you also prevent future opportunities, activities and other items from being assigned to it.

You may assign a new status to an account at any time, as required. For example, you can set any active account as obsolete, or any blocked account as active.

Using Map View

If your administrator has configured the solution accordingly, then you can display accounts in *Map View*, if desired. Choose *Map View* to see, in an integrated third-party mapping service, the location of each account address — both individually, and in relation to one another. Within *Map View*, you can also zoom in, zoom out, and pan in any direction.

Reviewing Tabs in Account Details

The tabs that you see in the account details depend upon the features of SAP Cloud for Customer that your company has implemented.

> Some of the tabs below are not visible by default. Assuming the features are enabled by your administrator, you must personalize the screen to make some tabs visible. For more information, watch the video Customizing Your Personal Settings .

From the account details, you can select these tabs to perform additional actions. The following table summarizes, per feature, the tabs that are available:

Tab	Actions	Available in SAP Cloud for Sales	Available in SAP Cloud for Service and SAP Cloud for Social Engagement
Overview	Select this tab to see the latest updates made to the account, the contacts designated to the account, and any addresses associated with the account.	X	X
Feed	Select this tab to read, open, tag, flag or comment feed updates that are associated with this account. For more information, see About the Feed [page 25].	X	X
Recent Orders	Select this tab to view recent orders that are associated with this account. If your administrator has not set up the 360 overview, then this tab will not appear.	X	X
Charts	• On this tab, under *Average Sales Cycle*, you can view the average sales cycle, in number of days, for this account and for all accounts. Data for each average sales cycle is represented separately, but both sets of data are represented in relation to the quarterly sales cycle. You may also export this data to Microsoft Excel®, if desired. For more information, see About Analysis [page 119]. • On this tab, under *Revenue Trend*, you can view the overall revenue trend for this account in relation to the quarterly sales cycle. You may also export this data to Microsoft Excel, if desired.	X	
Activities	Select this tab to view, edit or create appointments, tasks, phone calls, or e-mails that are associated with this account.	X	X
Account Team	Select this tab to add employees to, or remove employees from, the team responsible for this account. On this tab, if you possess the appropriate authorizations, you can also modify the role of employees who are assigned to this account. If territory management is active, then the sales territory team also appears in this tab.	X	X

Sales Territories	Select this tab to view associated sales territories. If your administrator has not configured the solution to make sales territories visible, then this tab will not appear.	X	
Relationships	Select this tab to view associated relationships. If your administrator has not enabled integration with SAP ERP, then this tab will not appear.	X	X
Addresses	Select this tab to view, edit or add addresses that are associated with this account. For any account, only one address can be specified as the main address. To indicate that an address may be used for shipping or billing, select *Yes* in the corresponding column. If more than one shipping or billing address is specified, select *Yes (standard)* in the appropriate column to designate an address as the default shipping or billing address. It is not possible to remove an existing address from an account, because the existing address may already be referenced by other items, such as leads and opportunities.	X	X
Contacts	Select this tab to add contacts to, or remove contacts from, this account. On this tab, you can also designate a contact as the *Primary Contact* for the account.	X	X
Account Hierarchy	Select this tab to view the displayed accounts in a hierarchical structure, provided that a parent account has been specified for the accounts at hand. You can expand and collapse the account hierarchy at any level to display as many or as few accounts as you like. If your administrator has not configured the solution to make account hierarchies visible, then this tab will not appear. Alternatively, if your administrator has activated the generic hierarchy structure and added accounts to it, then you can instead choose *Business Partners* > *Account Hierarchies* to view sales account hierarchies, provided that the administrator has assigned the corresponding work center and work center view to your business user.	X	X
Campaigns	Select this tab to view associated campaigns.	X	
Sales Leads	Select this tab to view or create sales leads that relate to this account.	X	
Opportunities	Select this tab to view or create opportunities that relate to this account.	X	
Attachments	Select this tab to view, edit or add attachments that relate to this account.	X	X
SAVO	Select this tab to view SAVO documents. If your administrator has not completed integration with SAVO, then this tab will not appear	X	
Sales Data	Select this tab to view associated sales data. If your administrator has not enabled integration with SAP ERP, then this tab will not appear.	X	

Sales Documents	Select this tab to view associated sales documents.	X	
Tickets	Select this tab to view associated tickets.		X
Target Groups	Select this tab to view associated target groups.	X	
Groups	Select this tab to view information that derives from SAP Jam, and to perform the following actions: • create internal groups in SAP Jam to collaborate on account team meetings, prepare for customer visits, and so on • create external or cross-company groups in SAP Jam to safeguard accounts, upsell products, and so on • automatically invite account team members and contacts to the group in SAP Jam, with the flexibility to add or remove e-mail addresses • view a list of groups in SAP Jam that are associated with the given account, and navigate from this list to SAP Jam • navigate from SAP Jam back to the account • view a list of recommended groups in SAP Jam for the given account, and navigate from this list to SAP Jam • view the latest SAP Jam Feed updates for the associated groups If your administrator has not enabled integration with SAP Jam, then this tab will not appear.	X	
Registered Products	Select this tab to view associated registered products.		X
Visits	Select this tab to view associated visits, and to set the recommended visit frequency for this account.	X	
Product Lists	Select this tab to view associated product lists.	X	X

Assigning Employees to an Account Team

1. Choose *Customers* > *Accounts*.
2. Open the appropriate account.
3. Select the *Account Team* tab.
4. Open the *Employees* pane or the *Shelf*.
5. Drag the appropriate employees from the *Employees* pane or the *Shelf* and drop them onto the *Account Team* tab.

Removing Employees from an Account Team

1. Choose *Customers* > *Accounts*.
2. Open the appropriate account.
3. Select the *Account Team* tab.
4. Find the employee to be removed.
5. Choose *Remove*.

See Also

Contacts [page 80]

Start Here for SAP Cloud for Sales

7.3 Contacts

Contacts are organized in relation to the accounts from which they originate. For more information, see Accounts [page 75].

On the *Contacts* tab, you can display existing contacts associated with accounts, create new contacts, and set contact statuses. You can also display contact details, review additional data, and rename and edit contacts, as required.

> Once you have created a contact, it can no longer be deleted. You can, however, set its status as *Obsolete*.

Tasks

Creating Contacts

1. Choose *Customers* › *Contacts*.
2. Choose *New*.
3. Enter the *First Name* and *Last Name* of the contact, then specify the *Account* that is associated with it.
   If desired, enter additional details for the contact, such as organizational information, or the *Phone*, *Mobile*, and *E-Mail* of the contact.
4. Save your entries.

   > If your administrator has scoped the solution to check for potential duplicate contacts, then select Check for Duplicates, before you save the contact, to ensure that its information is unique.
   > If the information you enter is found to resemble the information of an existing contact, then the solution notifies you that potential duplicate contacts were found.

   For a description of the available save options, see Save Options.

Editing Contacts

You can edit contacts from the *Contact* item header, as follows:

1. Position the cursor over the information to be edited. For example, if you want to rename the contact, position the cursor over the *Name* field.
   As you move the cursor over an editable field, the background changes to a different color. When you click a field, you enter edit mode.
2. Change the desired entries.
   Depending on the field, use the drop-down menu or automatic search to choose an entry.
3. Save your entries.
   For a description of the available save options, see Save Options.

> From the item header, you cannot edit the business address of the account that is associated with this contact, but you can use the drop-down menu to specify a different business address for this contact, if desired.
>
> To create or edit personal addresses for the contact, choose the *Addresses* tab.

Choosing Contact Filters

Contacts are displayed in one of three standard filters, described below:

Standard Contact Filters

Filter	Contacts Displayed
All	All contacts of all accounts that you are authorized to access.
My Contacts	All contacts of all accounts for which you are assigned as a member of the account team.
My Team's Contacts	All contacts of all accounts for which you are assigned as a member of the account team, and, if you are a sales manager, all contacts of all accounts for which any subordinate of yours is assigned as a member of the account team.

The standard filters above do not include obsolete accounts. To view obsolete contacts, create and save a new filter. For more information, see Working with Lists [page 55].

The default filter is *My Contacts*, You can modify the range of accounts displayed by selecting among these filters.

Setting Contact Status

From the contact details, use the *Actions* menu to choose the following applicable status:

- Choose *Actions* > *Set as Active* to change the contact status to Active.
- Choose *Actions* > *Block* to change the contact status to Blocked, which will exclude the contact from subsequent search results.
- Choose *Actions* > *Set as Obsolete* to change the contact status to Obsolete.

You may assign a new status to a contact at any time, as required. For example, you can set any active contact as obsolete, or any blocked contact as active.

Reviewing Tabs in Contact Details

The tabs that you see in the contact details depend upon the features of SAP Cloud for Customer that your company has implemented.

Some of the tabs below are not visible by default. Assuming the features are enabled by your administrator, you must personalize the screen to make some tabs visible. For more information, watch the video Customizing Your Personal Settings .

From the contact details, you can select these tabs to perform additional actions. The following table summarizes, per feature, the tabs that are available:

Tab	Actions	Available in SAP Cloud for Sales	Available in SAP Cloud for Service and SAP Cloud for Social Engagement
Overview	Select this tab to see the latest updates made to the contact, and any addresses associated with the contact.	X	X

Feed	Select this tab to read any Feed updates that are associated with this contact. For more information, see About the Feed [page 25]. On this tab, you can also open, tag or flag Feed updates, mark them as favorites, or comment them. For more information, see Tags [page 31] and Shelf [page 30].	X	X
Addresses	Select this tab to view, edit or add addresses that are associated with this contact. It is not possible to remove an existing address from a contact, because the existing address may already be referenced by other items, such as leads and opportunities.	X	X
Activities	Select this tab to view, edit or create activities that are associated with this contact — including appointments, tasks, phone calls, and e-mails. For more information, see About Activities [page 36].	X	X
Sales Leads	Select this tab to view leads that relate to this contact. For more information, see Sales Leads [page 82].	X	X
Opportunities	Select this tab to view potential sales opportunities for this contact. For more information, see Opportunities [page 84].	X	X
Relationships	Select this tab to view associated relationships. If your administrator has not enabled integration with SAP ERP, then this tab will not appear.	X	X
Registered Products	Select *Registered Products* to view registered products associated with this contact.		X
Campaigns	Select this tab to view associated campaigns.	X	
Marketing Interactions	Select this tab to view associated marketing interactions.	X	
Tickets	Select this tab to view tickets associated with this contact.		X

See Also

Accounts [page 75]

7.4 Sales Leads

Under *Sales* > *Sales Leads*, you can manage your sales leads, maintain relationships with your customers and prospects, and convert sales leads to opportunities. Sales leads are the starting point for future sales. Sales leads are created, qualified, and can be assigned to sales staff automatically, using rules created by the administrator.

Once a sales lead has been qualified, you can accept or decline that lead. You can also convert sales leads, once they have been qualified, to opportunities. To drive sales activity, you can also perform the following optional actions:

- Specify the source and campaign of your sales leads
- Classify sales leads according to a particular interest
- Qualify sales leads by applicable levels — for example, as cold, warm, or hot
- Track and analyze the success of your sales leads over a specified time frame
- Add team members to the marketing team for the sales lead

- Add products to the sales lead
- Add contacts to the sales lead

> You can only designate an employee as a contact for a sales lead if that employee is already a contact for the account that is associated with that lead. To view the list of contacts for the account, open the account details, then choose *Contacts*.

Tasks

Creating Sales Leads

1. Choose *Sales* > *Sales Leads* > *New*.
2. Enter the pertinent information about the sales lead.
3. Save your entries.

Qualifying Sales Leads

1. Choose *Sales* > *Sales Leads*.
2. Open the sales lead of interest.
3. Select *Qualification Level*, then specify the applicable level.
4. Save your entries.

Accepting or Declining Sales Leads

1. Open the sales lead of interest.
2. On the sales lead details screen, choose *Actions* > *Accept* or *Actions* > *Decline*.

Editing Sales Leads

1. Open the sales lead of interest.
2. Position the cursor over the information you want to edit.
   As you move the cursor over an editable field, the background changes to a different color. When you click a field, you enter edit mode.
3. Edit the sales lead as required, then save your entries.

Assigning Products to Sales Leads

1. Choose *Sales* > *Sales Leads*.
2. Open the desired sales lead.
3. Select the *Products* tab.
4. Open the *Products* pane or the *Shelf*.
5. Drag the desired product icon from the *Products* pane or the *Shelf* and drop it onto the *Products* table.

Removing Products from Sales Leads

1. Choose *Sales* > *Sales Leads*.
2. Open the desired sales lead.
3. Select the *Products* tab.
4. Find the product to be removed.

5. Choose the *Remove* icon in the *Actions* column next to the product you wish to remove.

Converting Sales Leads to Opportunities

When you convert a sales lead to an opportunity, the original sales lead remains in the system as a record. You can still edit the original sales lead, but you cannot delete it. You can further process, as required, the opportunity that arises from the sales lead.

To convert a sales lead to an opportunity, proceed as follows:

1. Open the qualified sales lead of interest.

   > Only sales leads whose status is *Qualified* can be converted to opportunities.

2. On the sales lead details screen, choose *Actions* > *Convert to Opportunity*.
3. Edit the opportunity that is to result from this sales lead, then save your entries.

See Also

Opportunities [page 84]

Start Here for SAP Cloud for Sales

7.5 VIDEO: Working with Leads

Video

Working with Leads (4m 48s)

Find out how to create and qualify leads, and how to convert leads to other items — such as opportunities— to drive sales activity.

7.6 Opportunities

Opportunities represent potential sales. Under *Sales* > *Opportunities*, you can display and edit existing opportunities, and create new ones. You can also edit opportunities that have been converted from leads, and assign products to opportunities, and employees to opportunity sales teams.

Tasks

Creating Opportunities

1. Choose *Sales* > *Opportunities*.
2. Choose *New*.
3. Enter the required information, including the corresponding account and probability of success.

4. Save your entries.
   For a description of the available save options, see Save Options.

Editing Opportunities

You can edit opportunities from the *Opportunity* item header, as follows:

1. Position the cursor over the information to be edited. For example, if you want to rename the opportunity, position the cursor over the *Name* field.
   As you move the cursor over an editable field, the background changes to a different color. When you click a field, you enter edit mode.
2. Change the desired entries.
   Depending on the field, use the drop-down menu or automatic search to choose an entry.
3. Save your entries.
   For a description of the available save options, see Save Options.

Choosing Opportunity Filters

Opportunities are displayed in one of three standard filters: *All Opportunities*, *My Opportunities*, or *My Team's Opportunities*. You can modify the range of opportunities to display by selecting among these filters. The default filter is *My Opportunities*.

Assigning Products to an Opportunity

1. Choose *Sales* > *Opportunities*.
2. Open the appropriate opportunity.
3. Select the *Products* tab.
4. Open the *Products* pane or the *Shelf*.
5. Drag the appropriate products from the *Products* pane or the *Shelf* and drop them onto the *Products* tab.

Removing Products from an Opportunity

1. Choose *Sales* > *Opportunities*.
2. Open the appropriate opportunity.
3. Select the *Products* tab.
4. Find the product to be removed.
5. Choose *Remove*.

Assigning Employees to an Opportunity Sales Team

1. Choose *Sales* > *Opportunities*.
2. Open the appropriate opportunity.
3. Select the *Sales Team* tab.
4. Open the *Employees* pane.
5. Drag the appropriate employees from the *Employees* pane and drop them onto the *Sales Team* tab.

> When you assign an employee to an opportunity sales team in this way, the solution assigns the *Sales Employee* role to that employee by default. If desired, you can change the role that is assigned to the employee.

Removing Employees from an Opportunity Sales Team

1. Choose *Sales* > *Opportunities*.
2. Open the appropriate opportunity.
3. Select the *Sales Team* tab.
4. Find the employee to be removed.
5. Choose *Remove*.

Requesting SAP ERP Pricing Information for an Opportunity

If your solution is integrated with SAP ERP, then you can request SAP ERP pricing information for an opportunity, as follows:

1. Open the opportunity for which you want to request pricing.
2. Choose *Products*.
3. Choose *Actions* > *Request Pricing*.

SAP ERP pricing information appears in the *Negotiated Price* column for each product. To enter a negotiated sales price manually, you can edit this field.

Collaborating on Opportunities via SAP Jam

If your solution is integrated with SAP Jam, then you can collaborate on opportunities via SAP Jam, as follows:

1. Open the opportunity on which you want to collaborate.
2. Choose *Groups*.

   If your administrator has not enabled integration with SAP Jam, then this tab will not appear.

3. On this tab, you can view information that derives from SAP Jam, and perform the following actions:
   - create internal groups in SAP Jam to collaborate on sales team meetings, prepare for customer visits, and so on
   - create external or cross-company groups in SAP Jam to collaborate on pricing negotiations, reference customer discussions, and so on
   - automatically invite sales team members and contacts to the group in SAP Jam, with flexibility to add or remove e-mail addresses
   - view opportunity data that is communicated to SAP Jam at the time the group is created
   - view a list of groups in SAP Jam that are associated with the given opportunity, and navigate from this list to SAP Jam
   - navigate from SAP Jam back to the opportunity
   - view a list of recommended groups in SAP Jam for the given opportunity, and navigate from this list to SAP Jam
   - view the latest SAP Jam Feed updates for the associated groups

Ending Opportunities

You end an opportunity by changing its status to *Won*, *Lost*, or *Stopped*. Proceed as follows:

1. Select an opportunity, choose *Actions*, and then select the appropriate status.

An opportunity must have the status *In Process* before you may change it to *Won* or *Lost*. Opportunities that have the status *Stopped* are not displayed in the *Opportunity Pipeline* or in the *Won/ Lost Opportunities* chart, and they are not taken into account for forecasting.

If you have selected the status *Won* or *Lost*, you can enter a reason why the opportunity was won or lost in the opportunity item header. The reason you select is displayed in the opportunity as *Reason for Status* under *Pipeline Status* and is also used in analytics.

2. Save your entries.

See Also

Sales Leads [page 82]
About Analysis [page 119]
Start Here for Sales

7.7 Retail Execution

7.7.1 About Retail Execution

Retail execution is a set of features that enables field sales personal to plan and record site visits and activities while on site at the account.

Retail execution is set up by a system administrator through the following process:

1. Create surveys. For more information see Surveys [page 88].
   Surveys are used for site checklists, customer surveys, and more.
2. Create activity plans. For more information see Activity Planner [page 90].
   Activity plans are lists of recommended or mandatory activities that the sales representative is tasked with while at a customer site.
3. Create Activity plan routing rules.
   Routing rules enable the administrator to automatically assign activity plans to different accounts, locations, or employees.

Once the administrator has set up the necessary surveys, activity plans, and routing rules, sales users can work in SAP Cloud for Customer for iPad to plan site visits and collect visit information while on site. For sales users the process is:

1. Plan site visits. For more information see Visits [page 91].
   This can be done on the browser, or via SAP Cloud for Customer for iPad. You can use the included system tools to plan the most efficient route between locations, check which sites are due for a visit, and review past visit notes.
2. Record visit information.
   Use SAP Cloud for Customer for iPad [page 135] to record visit information. This can include, for example:
   - Check in/check out times
   - Record tasks (from activity plan)

- Complete site checklists and customer surveys and attach photos when required
- Create sales quotes and orders
- Order site assets

See Also

Surveys [page 88]
Activity Planner [page 90]
Visits [page 91]
SAP Cloud for Customer for iPad [page 135]

7.7.2 Surveys

You can create surveys for store visits and tickets to complete during a store visit or a service appointment. Use surveys as checklists, or to answer questions about the store and how your products or the competitor products are presented there.

Business Background

Categories

Categories are attributes for surveys, questions, and answers. They are used when generating reports from survey responses to help you understand survey data.

For surveys, the category controls which of the product tabs is visible. Normally the *Products* tab is visible. But in case of *Competitor Products* category the *Competitor Products* tab is visible.

In the *Survey* fine-tune activity in business configuration you can add, maintain or delete categories. Also you can add your own combinations for the survey categories there.

Survey Statuses

- *In Preparation* (initial status): In this status you can add, change or delete questions and answers. Surveys with status *In Preparation* cannot be assigned to an activity plan or a visit.
  From *In Preparation* you can switch to *Active*.
- *Active*: Indicates that the survey is finished. You can use the survey for activity plans and store visits. If a survey is active you can't change, add or delete questions from it.
  From *Active* you can switch to *In Preparation* and *Obsolete*.
- *Obsolete*: The survey can no longer be assigned to new visits or activity plans. If the survey is already used for open, or in process store visits, the survey can still be completed during the visit.
  From *Obsolete* you can switch to *In Preparation* and *Active*.

Set the survey status from the Actions menu.

You can switch from *Obsolete* and *Active* to *In Preparation* only when there are no answers available for this survey.

Using Previous Answers

With the *Previous Answers* check box you can pre-populate answers from the previous response for that customer when the employee fills out a survey, for example, in a store or at the customer site.

Scoring

For multiple-choice questions you can use a scoring for the questions and the answers.

With the screen personalization you can make the fields visible for the maximum, minimum, and total scores that can be reached. The fields are available on the *Editor* tab, *Results* tab, and survey header.

On the *Editor* tab you can also see the *Maximum Score* and the *Minimum Score* for each multiple-choice question that are calculated as follows:

	Multiple-Choice (select one)	Multiple-Choice (select multiple)
Maximum Score	The score is calculated by multiplying the highest answer score with the question score. Question Score: 1 Answer A: 1 Answer B: 2 Answer C: 3 Maximum Score: 3*1=3 Question Score: 1 Answer A: 3 Answer B: -2 Answer C: -3 Maximum Score: 3*1=3	The score is calculated by summarizing the highest reachable answer scores and multiplying it with the questions score. Question Score: 1 Answer A: 1 Answer B: 2 Answer C: 3 Maximum Score: 6*1=6 Question Score: 1 Answer A: 3 Answer B: -2 Answer C: -3 Maximum Score: 3*1=3
Minimum Score	The score is calculated by multiplying the lowest answer score with the question score. Question Score: 1 Answer A: 1 Answer B: 2 Answer C: 3 Maximum Score: 1*1=1 Question Score: 1 Answer A: 3 Answer B: -2 Answer C: -3 Maximum Score: −3*1=−3	The score is calculated by summarizing the lowest reachable answer scores and multiplies it with the questions score. Question Score: 1 Answer A: 1 Answer B: 2 Answer C: 3 Maximum Score: 1*1=1 Question Score: 1 Answer A: 3 Answer B: -2 Answer C: -3 Maximum Score: −5*1=−5

> The scores are not shown when the employee fills out the survey.

Sections and Page Breaks

With a question type *Section* you can structure your survey, if required, by inserting additional headers.

With the *Page Break* check box you can create discrete pages in the survey. The current question and all following questions and sections are shown on a new page.

> When completing a survey in the SAP Cloud for Customer for iPad application, a page break requires a horizontal swipe gesture to reveal the next page.

Tasks

Creating a Survey

1. To create a survey choose New, or copy an existing survey by opening a survey and choosing Actions > Copy.
2. In the *New Survey* window enter a name and select a category, for example, `Product`.
3. If the survey is only valid in a specific time frame you can enter a valid from and valid to date.
4. Choose Save and Open.
5. Enter your questions on the *Editor* tab: Choose Add and enter a type, such as `Quantity`. Enter the question text, the question category, and other required information.
6. Mark the question as mandatory, if desired, and whether it should be placed after a page break.
7. If you selected survey category `Products` or `Competitor Products`, add the products or a whole product category for which the questions must be answered. Choose Preview to see an HTML preview with a rough structuring of your survey.
8. To activate your survey choose Actions > Activate.

Views and further tasks

After you created your survey you have to create activity plans and routing rules to be able to use the survey, for example, in visits and tickets. For more information, see Activity Planner [page 90].

7.7.3 Activity Planner

Use Activity Planner to create lists of activities that can be added to site visits. You can create standard lists of activities to be used with different accounts, or by different sales personnel. Use activity routing rules to associate plans with specific accounts, locations, or employees.

You can also create and assign activity plans for tickets. Activity plans can include tasks and surveys. This allows you to create workflows based on the ticket attributes.

Tasks

Create Activity Plans

1. View existing activity plans and create new plans under *Activity Planner* > *Plans*.
2. To create a new Activity Plan, choose *New*.
   Enter a name for the plan. If desired, you can also choose a date range when the plan is valid, and designate the plan as mandatory.
3. To open your new plan, choose *Save and Open*.
4. Add a task to the plan by choosing *New* under *Tasks*.
   Enter the required information, and choose *OK* when finished.

5. Create additional tasks as required.
   If desired, you can add notes for each task, and attachments such as a detailed instructions document.
6. To attach surveys to the activity plan, choose *Surveys*, then choose *Add*.

Once you create the activity plan, you can create routing rules to associate the plan with specific territories, accounts or employees.

Create Routing Rules

1. View existing routing rules and create new rules under *Activity Planner* > *Routing Rules*.
2. Enter a name for the routing rule.
3. To open your new routing rule, choose *Save and Open*.
4. To set up the conditions that define this routing rule, under *Conditions*, choose *Add Row*.
   Select the criteria for this condition by comparing data with a desired value. Construct your routing rule by adding more conditions using logical OR/ AND operators.
5. To select the activity plans that follow this routing rule, on the *Activity Plans* tab, choose *Add*.
6. Save your changes when you have finished defining the routing rule.
7. To start using the routing rule, set the status to active by choosing *Actions* > *Set as Active*.
   Once active, the system uses the routing rule to associate the specified activity plans with site visits.

See Also

About Retail Execution [page 87]
Surveys [page 88]
Visits [page 91]

7.7.4 Visits

Customer site visits are a part of creating and keeping good relationships with customers. They can also be a way to discuss, run, and monitor marketing activities, such as campaigns.

On the *Visits* tab, you can use tools such as tasks, surveys, and campaigns to gather and record information from each customer visit.

The steps of this process can be completed either in SAP Cloud for Customer in the browser or in SAP Cloud for Customer for iPad, with one exception: route planning is only available in the browser.

You can set the recommended frequency for visits in the account detail view, *Visits* tab.

Tasks

Create Visits

1. View your accounts under *Visits* > *Visit Planner*.
   To help you prioritize visits, you can sort your list of accounts using filters, including the below:

- *My Accounts with No Visits Planned*
  These are your accounts where there are no future visits planned.

  > If the *Next Planned Visit* date is in the past, it will not show up under this filter.

- *My Accounts Overdue for Visits*
  These are your accounts where the *Visit Before* or *Next Planned Visit* dates have passed without a visit.

2. Select the account you want to visit and choose *New Visit*.
3. Enter the necessary information and save the visit.
   To check your schedule for upcoming visits and appointments, you can use the *Calendar* pane.

   > Other activity types, such as phone calls, e-mails, and tasks, do not appear in the *Calendar* pane.

Plan Your Route

If your administrator has enabled Google™ maps, you can plan your route for when you have multiple customer visits.

> You cannot use route planning in SAP Cloud for Customer for iPad. Route planning is only available in the browser.

- Go to *Visits* > *Visit Planner*.
- Highlight the accounts you want to visit, then choose Web Services > *Route Planner*.

You can then plan your route in more detail using Google™ maps.

Add Tasks or Surveys to the Visit

You can add items to help you document your visit. These items are predefined in activity plans by your system administrator, and may include general checklists, industry-specific surveys, or recommended tasks to complete while you are onsite. To view these items and add the relevant ones, do the following:

1. Under *Visits*, open one of your visits.
2. To add standard tasks, choose *Tasks* > *Add*.
   A list of predefined tasks appears. Select the ones that are relevant for this visit.

   > All tasks and surveys are routed using certain rules. If you do not find the task or survey you expected to see in the list, ask the person who created the tasks or surveys to ensure that the routing rules were set up properly. For more information, see Activity Planner [page 90].

3. To add standard surveys or checklists, choose *Surveys* > *Add*.
   A list of predefined surveys appears. Select the ones that are relevant for this visit.

   > All tasks and surveys are routed using certain rules. If you do not find the task or survey you expected to see in the list, ask the person who created the tasks or surveys to ensure that the routing rules were set up properly. For more information, see Activity Planner [page 90].

Check Current Campaigns

In the visit overview, you can see the number of ongoing or upcoming campaigns that are assigned to this account. For more information about specific campaigns, check the *Campaigns* tab, where you can link to the assigned campaigns directly.

Arrive and Check In

1. When you arrive at a customer's site, open the visit.
2. Choose Check In.
   Checking in captures the date and time and opens the visit for editing, allowing you to record information about this visit in the system.

Complete Tasks and Surveys

During your site visit, you can open each task, survey, or checklist and process it accordingly.

1. From the visit, choose the *Tasks* or *Surveys* tab.
2. Open the task or survey and complete the items it contains.
3. Add any relevant notes.
4. For surveys, you can add pictures as attachments.
   - In SAP Cloud for Customer for iPad, there are predefined picture sizes for you to use.

     For performance reasons, we recommend attaching a maximum of one large picture, 10 medium pictures, or 30 small pictures per survey.

   - Pictures you add to the survey appear as attachments to both the survey and the visit.
5. When you have completed the task or survey, set it to completed by choosing Actions > *Set as Complete*.

Add Contacts

If you have met or worked with another contact for this account during your visit, you can add that person to the visit under *Contacts*.

Only contacts that are listed in the account itself appear for selection.

Create Follow-Up Items

During your visit, if you discover that the customer needs additional products, an upgrade, or spare parts or repairs, create a follow-up item. The following table outlines the types of requests, lists examples, and indicates how to order them in the system.

Request Type	Examples	In the visit, choose *Follow-Up Items* > *New*
Product order	Out-of-stock products	*Sales Quote*
Opportunities	Machine should be upgraded to the latest model	*Opportunity*
Spare parts or repair	Appliance for storage (refrigerator) or demonstration (mini-grill) does not work	*Service Ticket*

Add Pictures or Other Attachments to the Visit

To add additional documents or pictures as part of this visit, add them in the visit under *Attachments*.

Leave and Check Out

After you have wrapped up your visit with the customer and entered all the information you wanted to record for the visit, choose Check Out.

Checking out automatically sets the status of the visit to *Completed*.

To edit the visit after you have checked out, set the status back to *In Process* and then make your changes.

7.8 Sales Quotes

7.8.1 VIDEO: Creating Sales Quotes

Video

Creating Sales Quotes (4m 21s)

Find out how to create a sales quote.

7.8.2 Creating and Processing Sales Quotes

A competitive and successful sales professional knows the benefits of an effective quote management system. When you submit sales quotes, it is essential to capture the desired product requests of your potential customers in order to strengthen the competitive position of your company.

For more information, watch the video Creating Sales Quotes, or follow the steps below.

Business Background

Product Lists with Accounts as Proposal in the Sales Quotes

With product lists, you can combine a set of products associated with an account. When you create a sales quote for an account that has an associated product list, the product list will appear at the end of the form after you choose New.

To create a product list, enable in the *Product Lists* view in the *Products* work center. There you then can create a list, and use it in your quote when the list is activated.

Sales Quote Processing

Sales quote processing is used to offer products to customers according to specific terms with fixed conditions. The seller is bound by the sales quote for a specific period of time. The sales quote is usually created by a sales representative of the company. The system supports pricing capabilities.

For more information, see Sales Quote Processing [page 98].

Approval for Sales Quotes

For more information, see here.

Pricing

Pricing is based on price master data such as price lists and discount lists, which are used to automatically calculate pricing within all business documents. A predefined pricing procedure is used to determine the net value the

customer has to pay for certain products to be received on a certain day at a certain place. The pricing procedure consists of price components, such as list price, discounts, surcharges, freights, and costs. The order of these price components is essential for the calculation of the total value.

For more information, see Pricing [page 217].

Party Processing

For more information, see here [page 220].

Document Type 'Sales Order Request'

For the sales quotes you can create of course your own document types. But in the standard you can select `Sales Quote` and in case you are working with visits you can also select `Sales Order Request`. With the sales order request the output management for the sales quote is deactivated because in the visit scenario you should get the approval for the quote by the customer directly in the office or store. A sales order request therefore has also no validity.

Tasks

Creating a Sales Quote

1. You create a sales quote using the New Sales Quote tool which you can access from the following locations in the system:
   - From the toolbar, click *New Sales Quote*.
   - Under *Sales* > *Sales Quotes* click New.
   - You can also copying an existing sales quote by opening a quote and choosing *Actions* > *Copy*. The whole content then is copied and you can adapt it to your needs.
2. Enter the account, date, and owner.
3. In case you have created a *Product List* for the entered account you will get the products as proposals during the creation of the sales quote. Enter the quantities for the products you want to use and then save your entries.
   The sales quote is created with status *Open* and products without any entered quantities won't be taken over.
4. Open the newly created sales quote and enter or change at least the product the customer requested the quote for.
5. Save your entries and click Actions > *Submit* to trigger further processing, for example, sending it using fax or e-mail, or printing it for sending it by normal mail.
   In case an approval is required for the quote, the output starts as soon as the approval is given.

Editing a Sales Quote

1. Open a sales quote you want to update under *Sales* > *Sales Quotes*.
   - On the *Products* tab you can add or delete products, enter external and internal notes concerning the product, and add attachments.
     You can view and change the internal and external notes for the sales quote and the products: The *Internal Note* is only stored with the document and the *External Note* is also forwarded to the customer and forwarded to the ERP system, in case you use the integration.

- On the *Involved Parties* tab you can add or delete parties and contacts. Here you can also select other addresses that you entered in the master data.
- On the *Sales Documents* tab you get an overview about the related sales quotes and the sales order requests and sales orders processed in the ERP system.
- On the *Attachments* tab you can add attachments, for example, local files, web links, and links to Library content.
  Here you find also the customer's signature of the quote done on an iPad in case the customer accepted the quote directly during a visit and signed it on the iPad.

  > Please be aware that this is not a legally binding signature.

- On the *Pricing* tab you can edit the price components of your items manually or trigger an update according the pricing master data.
  Here you can also edit the *Pricing Date*, in case the pricing date differs from the *Date* of the sales quote. This might happen if you want to use a special price list that is not valid for this date.
- On the *Approval* tab you can enter additional information for the approver and the approver can add also comments.
- On the *Activities* tab you have an overview about the activities and you can add appointments, tasks, and phone calls. Here you see also the e-mails related to this quote.
- On the *Output* tab you can see the output history and the sent out documents as PDF files. Here you can also trigger the sending of a document again by clicking Resubmit.
- On the *Overview* tab you see the latest changes of the quote, the products, and involved parties.
- On the *Feed* tab you can see major updates concerning the quote. For more information, see About the Feed [page 25].

2. Save your changes.

Structuring and Renumbering Products

Before you can structure your sales quote you must personalize the *Products* tab. For this open the sales quote, go to the *Products* tab, click *Personalize* at the upper right of the screen and choose *This Screen*, select *Products* under *Sections:*. Then select the *Parent Line* field, save your changes and close the *Personalize* pane.

1. You can structure the entered products with text lines. To do so, add lines with only a description on the *Product* tab.
2. Then enter the line number of the created text line as *Parent Line* to the corresponding product line.
3. To rearrange your product list click *Actions* > *Renumber* and save your changes.

> - You can cascade several text lines, but you cannot use a product line as structuring element.
> - On text line level you can add more text to describe this part and add attachments.

Triggering Approval and Output

1. After you have created a sales quote click *Actions* › *Submit* to trigger the approval check and the output of the sales quote.
2. The system then checks whether an approval is required for the quote, and in case it is required the necessary notifications are generated for the responsible employees.
3. Only after the approval is given or is not necessary the output of the sales quote is generated by the system according the output settings which can be viewed and edited under *Actions* › *Edit Output Settings* .
4. The document then is either sent to the local printer or sent to the customer as e-mail.

Previewing a Sales Quote

1. Open the sales quote.
2. Choose *Actions* › *Preview* .
   A new window opens with the quote as PDF document.

Creating a Follow-Up Sales Quote

1. In the sales quote where you want to create a follow-up quote from select the *Sales Documents* tab.
2. Under *Sales Quotes* click New .
   The data from the current quote is copied into the quick activity form.
3. Adapt the entries and select *Save* › *Save and Open* .
   The system copies the whole quote including the products into a new document and opens it.
   In the old quote you can find the new quote now under *Sales Documents*.
4. Now you can work with the new sales quote.

Deleting a Sales Quote

1. Choose *Sales* › *Sales Quote* and select the line of sales quote you want to delete.
2. Click the *Delete* icon in the *Actions* column.
   The sales quote is deleted in the system.

Quotes that have been submitted to a customer cannot be deleted, but can be cancelled.

Cancelling a Sales Quote or a Single Item

1. Choose *Sales* › *Sales Quote* and open quote you want to cancel.
2. To cancel the entire sales quote, choose a *Reason for Rejection* and save your changes.
   The system sets the quote to *Lost* and the status to *Completed*.
3. To cancel the a single item choose on the *Products* tab for the corresponding line item a *Reason for Rejection* (hidden field in standard) and save your changes.
   The system sets the status to *In Process*.

Creating Sales Orders in SAP ERP

In case your SAP Cloud for Customer system is conducted with SAP ERP, you can create sales orders in ERP that are replicated from sales quotes in the SAP Cloud for Customer system. The corresponding sales quote must be at least consistent and must have at least one product.

1. To replicate a sales quote to a sales order in the SAP ERP system select the sales quote and click Submit.
2. Then click Action > Create Sales Order.
3. Save your changes.
   The quote has been replicated into the SAP ERP system as inquiry with reference to the sales quote.
   You can find the references to the business documents, such as sales order requests and orders, created in the ERP system on the *Sales Documents* tab under *SAP ERP Sales Documents*.

- If a sale quote is changed after replication, the changes are not forwarded to ERP after the replication.
- If you use incoterms in sales quotes of the SAP Cloud for Customer system make sure that you decided in the configuration in the SAP ERP system under *Customers: Incoterms* whether the location for the corresponding incoterms is mandatory or not. As result of your decision either only the field *Incoterms* or both, *Incoterms* and *Incoterms Location*, must be filled in the sales quote before forwarding the quote to SAP ERP.

7.8.3 Sales Quote Processing

Overview

Sales quote processing is used to offer products to customers according to specific terms with fixed conditions. The seller is bound by the sales quote for a specific period of time. The sales quote is usually created by a sales representative of the company. The system supports pricing capabilities.

Features

- You can create and edit notification rules for the handling of sales quotes in the *Administrator* work center under *Workflow* > *Notification Rules.*. For more information, see Notification Rules Quick Guide.
- Directly accepted sales quote: If you don't need the acceptance by the customer afterwards you can prevent this by streamlining your processing and prevent the whole output management after the quote was submitted. For more information see Configuring Sales Quotes.

Process Flow

The following steps explain the typical process flow for sales quote processing. During this process, you access the *Sales* work center.

1. The sales representative creates a sales quote and enters first the account, and the products to be offered.

2. The system uses details such as account, products, and date to calculate net value. The sales representative can overwrite the automatically-determined prices and discounts or add further discounts and surcharges.
3. Optionally, the sales quote may need to be approved according your approval processes, if certain thresholds have been exceeded such as total net value or total given discounts. For more information about approval processes, see Approval for Sales Quotes.
4. The sales quote is sent to the customer through the Submit action according to the output settings.
5. If the account accepts the sales quote, it can be set to *Won* and the status changes to *Completed*. With ERP integration you can also transfer the sales quote into a sales order in ERP through Action > *Create Sales Order*.

See Also

Start Here for SAP Cloud for Sales

7.9 Forecasts

On the *Forecasts* tab, sales representatives and sales managers can create forecasts in multiple dimensions — including product and product category — on the basis of accounts, opportunities, employees and sales organizations.

> If Territory Management is active, then forecasts can also be created on the basis of territories.

Like sales representatives and sales managers, administrators can also create forecasts, as summarized in the following table:

Forecast Authorizations by Functional Role

Functional Role	Forecast Authorizations
Sales Representative	Sales representatives can create opportunity forecasts or product forecasts; for either forecast type, they can enter forecast data, select forecast dimensions and maintain forecast values at the selected dimension level. They can also submit forecasts of either type for aggregation into the forecasts of their managers, and adjust and re-submit any forecasts that their managers have identified to require revision.
Sales Manager	Sales managers can create, in addition to opportunity forecasts and product forecasts, opportunity aggregate forecasts and product aggregate forecasts. They can also return for revision forecasts that their sales representatives have submitted, and that require adjustment. By means of the forecasts their sales representatives have submitted, sales managers can create opportunity aggregate forecasts and product aggregate forecasts at selected forecast levels.
Administrator	Administrators can create forecasts for any other user in the system, although they can only create aggregate forecasts of either type for sales managers. Administrators can also modify any forecast that has been created by any sales representative or any sales manager.

Sales representatives submit new forecasts to sales managers, who can request revised forecasts, if required. When the revised forecasts are complete, sales representatives can submit them to their managers anew. Version management enables sales representatives and sales managers to keep track of any revisions that have occurred in their respective forecasts.

Tasks

Choosing Forecast Filters

Forecasts are displayed in one of two standard filters: *My Forecasts*, and *My Team's Forecasts*. You can modify the range of forecasts to display by selecting among these filters. The default filter is *My Forecasts*.

Displaying Forecasts and Forecast Data

To display a forecast, rest the cursor on the `Name` of any forecast. In response, the system will display the forecast (and its details) in quick view.

To display the data that is associated with a forecast, click on the icon that is displayed for the forecast in the *Data* column. In response, the system will open the forecast in Microsoft Excel ®, where the data associated with the forecast is displayed.

Forecast data is displayed by means of Microsoft Excel. Therefore, if you wish to display forecast data, you are required to use Microsoft Excel.

To use Microsoft Excel with your solution, ensure that the Add-In for Microsoft Excel is correctly installed, as follows:

1. Choose *Downloads*, then download the *Add-In for Microsoft Excel®*.
2. Run the installation and setup wizards that appear.
3. Open Microsoft Excel, then ensure that the add-in is active. If needed, consult the documentation in Microsoft Excel for instructions on how to activate add-ins.
4. Ensure that your Web browser is set to prompt automatically for file downloads. If needed, consult the documentation in your Web browser for additional information.

Forecasts are summarized in relation to the following columns:

From	To	Level	Status	Owner	Sales Unit	Revenue	Latest Version

The entries in the *From* and *To* columns indicate, respectively, the year-month combination for which the forecast begins and ends — for example, from 2013–01 to 2013–12. The entries in the *Level* column indicate whether the forecasts at hand are an opportunity forecast, a product forecast, or an aggregate forecast of either type.

Creating Forecasts

1. Select *Sales* > *Forecasts*.
2. Choose *New*; this option appears above the *Search this view* field.

   > You can also choose *New Sales Forecast* from the toolbar. For more information, see Options for Creating Items.

3. Enter the *Name* of the forecast, along with the following data:
   a. *Currency*, if desired.
   b. Under *From Year-Month*, the year and month in which the forecast should begin.
   c. Under *To Year-Month*, the year and month in which the forecast should end.
   d. *Level*.
   e. *Source*, if desired.
4. Save your entries. For a description of the available save options, see Save Options.

Upon completing this procedure, the newly created forecast appears in the *Forecasts* tab, and is assigned the status *In Preparation*.

At the appropriate time, the forecast can be submitted for aggregation into the forecasts of the sales manager.

Submitting New Forecasts

Sales representatives can submit new forecasts for consideration in the aggregate forecasts of their sales managers, as follows:

1. Select *Sales* > *Forecasts*.
2. Rest the cursor on the *Name* of the new forecast — with status *In Preparation* — to be submitted.
   In response, the item details of the forecast are displayed in quick view.
3. Choose *Open* to open the forecast, then choose *Actions* > *Submit* within the item header.

Upon completing this procedure, the status of the forecast changes to *Submitted*. The submitted forecast will be included for aggregation into the forecasts of the corresponding sales manager.

If the sales manager is not satisfied with the forecast as submitted, he or she may request revision from the sales representative. If such a revision is requested, the status of the forecast changes to *In Revision*, and the sales representative must submit a revised forecast.

Revising Forecasts

Sales managers can request revision of the forecasts that are submitted by their sales representatives, as follows:

1. Select *Sales* > *Forecasts*.
2. Rest the cursor on the *Name* of the forecast — with status *Submitted*.
   In response, the item details of the forecast are displayed in quick view.
3. Choose *Open* to open the forecast, then choose *Actions* > *Revise* within the item header.

Upon completing this procedure, the status of the forecast changes to *In Revision*. The sales representative can now submit a revised forecast.

Submitting Revised Forecasts

Sales representatives can submit revised forecasts for renewed consideration in the aggregate forecasts of their sales managers, as follows:

1. Select *Sales* > *Forecasts*.
2. Rest the cursor on the *Name* of the forecast — with status *In Revision*, indicating that the sales manager has requested a revision of the forecast.
   In response, the item details of the forecast are displayed in quick view.
3. In quick view, choose *Open* to open the forecast.
   In response, the item details of the forecast are displayed.
4. Select the *Versions* tab.
   In response, an overview of the versions of this forecast is displayed.
5. Choose *Add*.
6. In the resultant dialog, specify the revised forecast, then choose *Save*.
7. Within the item header, choose *Actions* > *Submit*

Upon completing this procedure, the status of the forecast changes to *Submitted*. The submitted forecast will be included for aggregation into the forecasts of the corresponding sales manager.

If the sales manager is not satisfied with the revised forecast as submitted, he or she may request revision again from the sales representative. If such a revision is again requested, the status of the forecast changes to *In Revision* again, and the sales representative must repeat the procedure above to submit another revised forecast.

See Also

Opportunities [page 84]

7.10 Territories

Provided that Territory Management is active in your solution, sales administrators can create sales territories and organize them into hierarchies, which are used to delegate responsibility for each sales territory to the appropriate sales representatives. Sales administrators perform all associated tasks under *Sales* > *Territories*.

7.11 Sales Target Planning

Sales planning functions are performed by sales managers.

> Although sales representatives cannot perform sales planning functions, they can review reports that contain data that is associated with these functions. For more information, see Working with Sales Planning Data [page 122].

Prerequisites

Sales planning is activated. For more information, see Activating Sales Planning.

Business Background

Business Planning

Planning for your business involves three different elements: strategic planning, financial planning, and operational planning. While strategic planning is a high-level management task and therefore takes place outside of the system, financial and operational planning are supported by tools and applications that have been designed to guide and support you in mastering your company’s planning and budgeting tasks. Compared with traditional spreadsheet-based approaches, the system's planning features improve the efficiency and quality of the planning process by enhancing collaboration between planners, ensuring the consistency of planning data, and enabling drilldowns into various data dimensions.

Sales Planning

Sales planning offers a solution that enables you to define and monitor sales targets. It promotes seamless monitoring of sales targets, forecasts, and revenues and also makes it easy to create new plans.

Tasks

Creating a Sales Plan

1. Choose *Sales* > *Sales Target Planning* > *New*.
2. On the *Set General Properties* screen, enter the necessary data - such as *Sales Unit*, *Horizon From/To*, *Plan Name*, and *Currency* - then choose *Next*.

   You can only have one plan for a certain sales unit and horizon. The overlapping of horizons for the same sales unit is not allowed.
   By default, the currency of the sales unit's company is used. However, as long as the sales plan remains in preparation, you may change this currency, if desired.

3. Specify the granularity of your plan on the *Select Planning Dimensions* screen. You can select the accounts, employees, product categories, and products that you want to be shown in the plan. You can also select the planning items to be planned, for example, certain employees, accounts, or products. Then choose *Next*.
4. You can enter a description for the active version or you can create a new version on the *Manage Plan Versions* screen. Then choose *Next*.
5. You can select the data on which your planning is to be based and where it should be copied to on the *Copy Actual Data* screen. First choose the plan data from existing sales plans that are created for the corresponding sales units in general data and the selected planning dimensions and time period that should be taken into account. Then select the plan version into which the data should be copied.
6. On the *Review* screen, review your entries.
7. To confirm your changes, choose *Finish*.
8. On the *Confirmation* screen, you can open the plan data in Microsoft Excel® or close the guided activity.

Editing a Sales Plan Structure

1. To edit sales plan data in Microsoft Excel, select the appropriate plan.

   Before you use Microsoft Excel to edit sales plan data, choose *Download* to download the *Add-In for Microsoft Excel®*.

2. Choose *Edit*, then select *Plan Data in Excel*.
   The sales targets are opened in Microsoft Excel. Now you can adjust the targets for your planning horizon.
3. To show or hide dimensions, open the *View* pane. To this end, choose the *SAP Business ByDesign* tab, find the *View* area, and choose *Change the Current View of the Report*.

   You can also open and save views with different dimensions and settings in the panel.

4. Select a desired dimension and drag and drop it to the rows and columns as necessary.
5. You can also define how the data should appear on the user interface for each planning dimension by selecting the row or column label in the panel and changing the selections underneath.
6. Enter your sales targets in the plan.
7. After you have finished the planning, to recalculate the planning data in the workbook choose *Refresh* on the *SAP Business ByDesign* tab in the Microsoft Excel ribbon.

If you enter a total target for a dimension, the sum is distributed to the unchanged items. Changed items are not affected during the recalculation.

8. To finalize the planning, save your data by choosing *Save All* on the *SAP Business ByDesign* tab.

Activating a Sales Plan

1. Select the sales target plan under *New* > *Sales Target Planning*.
2. Select *Change Status* > *Active*.
   The plan is now activated.

See Also

About Analysis [page 119]

7.12 Analysis

7.12.1 Analysis for HTML5 for Cloud for Sales

7.12.1.1 Using Interactive Dashboards

Interactive dashboards allow you to get a big picture of your data, then zoom in by selecting a chart element, or by selecting specific characteristics, and applying filters. You access interactive dashboards on your browser, or with the SAP Customer Insight iPad app.

Please note that this document is relevant only for HTML5-based screens. Either the described function is available only in HTML5, or its HTML5 version differs from the Microsoft Silverlight® version. To use this function in the Microsoft Silverlight client, please log on to the Microsoft Silverlight-based screen and follow the instructions in the corresponding help document.

Your solution is HTML5-based if the system URL contains `/HTML5`. Your solution is Microsoft-Silverlight-based if a *Silverlight* pop-up window appears when you right-click anywhere on the screen.

Tasks

Accessing Dashboards

- Browser
  1. Choose the *Analysis* tab.
  2. Choose *Dashboard*.
  3. Select the desired dashboard from the menu.
- SAP Customer Insight for iPad app

1. Choose the sprocket icon at the upper right corner of the screen.
2. Choose *Dashboard*.
3. Select the desired dashboard from the menu.

Configuring a Chart

You have several options to control how the chart data appears on screen.

- Select a chart type from the settings menu.

  > The dashboard on SAP Customer Insight for iPad has one additional chart type not available via the browser: a funnel chart. This chart resembles an inverted cone divided into sections representing the data categories. The largest category value appears at the top and the smallest value appears on the bottom. The funnel chart is useful for displaying data sets where the importance of the category corresponds to the category value, or size.

- Show or hide the chart legend. Find this option in the Settings menu on the browser, or on SAP Customer Insight for iPad, choose the small icon at the upper left of the chart.
- Choose a data element on a chart and linked reports update to reflect your selection. For example choose a specific bar in a bar chart, and linked reports on the dashboard update to show data from the selected element.

Drill Down and Filtering Data

Drill down and filter chart data to expose the information most relevant for you.

1. Open the drill down pane for a chart by choosing the drill down icon.
2. Select Drill Down , then select the desired characteristics.
   The chart updates immediately to reflect your selections.

> Linked charts do not update when the drill down pane is open.

- Choose *Reset Dashboard* to remove drill down characteristics and filters from all charts on the current dashboard.
  (On SAP Customer Insight for iPad, from the dashboard list menu, choose *Reset Current Dashboard*.)

Annotating and E-Mailing Dashboards

If you are viewing the dashboard on the SAP Customer Insight for iPad app, you can add annotations and send an image of the annotated dashboard as an attachment via e-mail.

1. Choose *Annotation* from the Action menu.
2. Select a color for freehand markup, or select the note icon to enter a text note.
3. Draw your markup or enter text.
4. Choose *Send as E-Mail* from the Actions menu to send an image of the annotated dashboard as an attachment.
5. Choose *Cancel* to exit annotation mode.

7.12.1.2 Charts

Overview

When you work with reports, you can choose from a range of charts to display data.

Not all reports are suitable to be displayed as a chart. For example, if the report to be displayed as a chart contains large amounts of data with multiple key figures and characteristics, you may want to restrict the number of characteristics and key figures in the report so that the display of data in the chart is comprehensible.

Please note that this document is relevant only for HTML5-based screens. Either the described function is available only in HTML5, or its HTML5 version differs from the Microsoft Silverlight® version. To use this function in the Microsoft Silverlight client, please log on to the Microsoft Silverlight-based screen and follow the instructions in the corresponding help document.

Your solution is HTML5-based if the system URL contains `/HTML5`. Your solution is Microsoft-Silverlight-based if a *Silverlight* pop-up window appears when you right-click anywhere on the screen.

Troubleshooting

There may be other reasons why a chart cannot be displayed. See the following list of possible issues:

- Chart not possible; hierarchy on characteristic is active.
  There is a characteristic in rows for which a display hierarchy is active.
  1. Check the characteristics under *Row Fields* by clicking the characteristics and choosing *Settings*.
  2. On the *General* tab page, from the *Display Hierarchy* dropdown list, select *Do Not Show*.
- Chart not possible; arrange as hierarchy is active.
  1. The table setting *Arrange As Hierarchy* is active. From the sprocket icon, select *Table Settings*.
  2. On the following screen, from the *Arrange As Hierarchy* dropdown list, select *None*.
- Chart not possible; multiple units of measure are used.
  The key figures displayed have different units of measure.
  - Check which units of measure are used and determine if all key figures are necessary for the chart. If all key figures are not necessary, remove the relevant key figures so that the units of measure match for the key figures displayed. For example, there are quantity and currency units of measure. You only really need the quantity key figures so you remove the currency key figures.
  - If you only have key figures with currencies, check if the currencies are the same. If the currencies are different, You can, for example, use the *Display Currency* variable. Click the pencil icon next to the *Selection* dropdown list, If the *Display Currency* variable is available, set the value accordingly.
- Chart not possible; key figures are in rows or characteristics are in columns.
  Ensure that the key figures are in columns and the characteristics are in rows. Under columns, you can have a characteristic, but only above the key figures.
- Chart not possible; no key figure selected.
  Ensure that you have at least one key figure in columns.
- Chart not possible; no characteristic selected.
  Ensure that you have at least one characteristic in rows.

Types of Charts

The examples in the charts are based on the following set of hypothetical data.

Product Category	Net Sales 2002	Invoiced Quantity 2002	Sales/Quantity 2002
PC Software	1081271.23	820857004	0.001317247
Office Supplies	838037.56	153849431	0.005447128
PC Hardware	1023172.92	534755366	0.001913348
Product Category	Net Sales 2003	Invoiced Quantity 2003	Sales/Quantity 2003
PC Software	1076779.96	819754991	0.001313539
Office Supplies	1093672.49	201754225	0.005420816
PC Hardware	82022.07	475236004	0.000172592

Example of data in a report

Bar

Shows comparisons between individual elements shown in a bar chart. Categories are arranged vertically and values are arranged horizontally. The emphasis is on the comparison of values and not on displaying a change during a period of time.

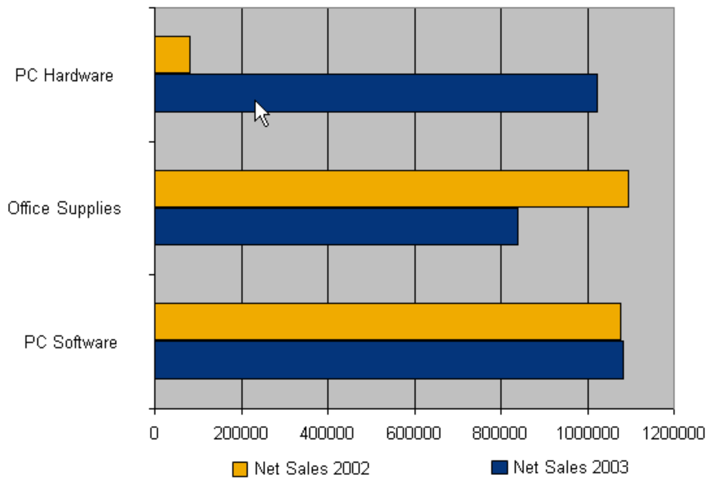
The data as shown in table format is displayed in a bar chart as follows:

- The X axis shows the values in columns.
- The Y axis shows the values in rows.

You want to visualize the difference in net sales value between 2002 and 2003 for each product category.

The X axis shows net sales for 2002 and 2003.

The Y axis shows product categories.



Example of a bar chart

Column

Shows comparisons between individual elements. Categories are arranged horizontally and values are arranged vertically. The emphasis is on comparing a change in value during a period of time for individual elements.

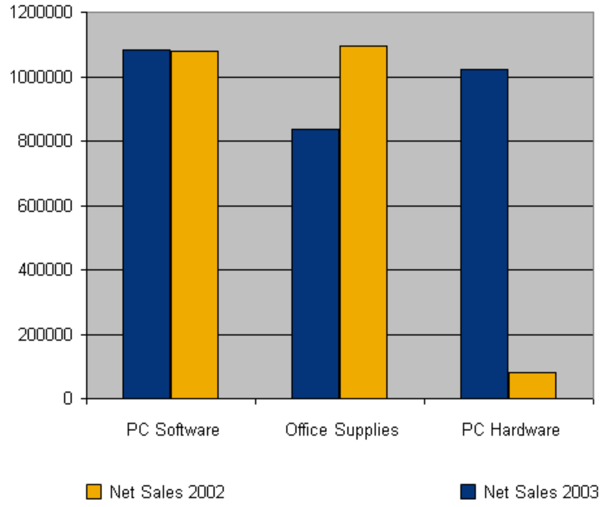
The data as shown in table format is displayed in a column chart as follows:

- The X axis shows the values in rows.
- The Y axis shows the values in columns.

You want to visualize the difference in net sales value between 2002 and 2003 for each product category.

The X axis shows product categories.

The Y axis shows net sales for 2002 and 2003.



Example of a column chart

Line

Shows trends in your data over time. The data is entered at regular intervals. Points in lines represent the intersection of the X and Y axes.

The data as shown in table format is displayed in a line chart as follows:

- The X axis shows the values in rows.
- The Y axis shows the values in columns.

You want to visualize the trend in invoiced quantity for your product categories.

The X axis shows product categories.

The Y axis shows invoiced quantities for 2002 and 2003.

Example of a line chart

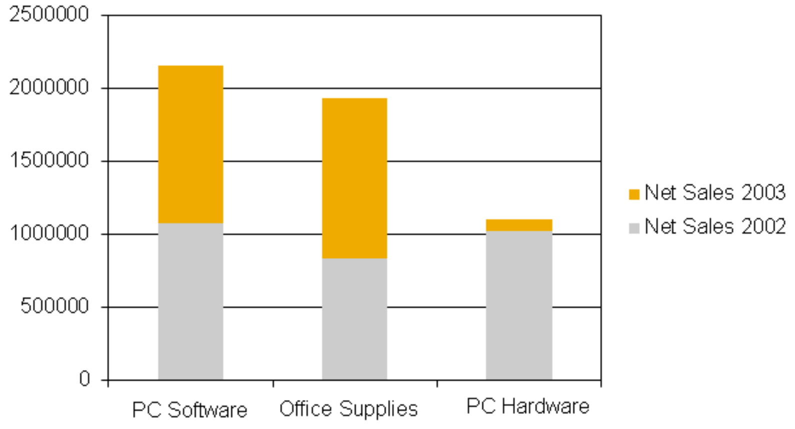
Stacked Column

Shows comparisons between individual elements in a category. Categories are arranged horizontally and values are arranged vertically. The emphasis is on the comparison of values in a category.

You want to visualize the difference in net sales value between 2002 and 2003 for each product category.

The X axis shows product categories.

The Y axis shows net sales for 2002 and 2003.



Example of a stacked column chart

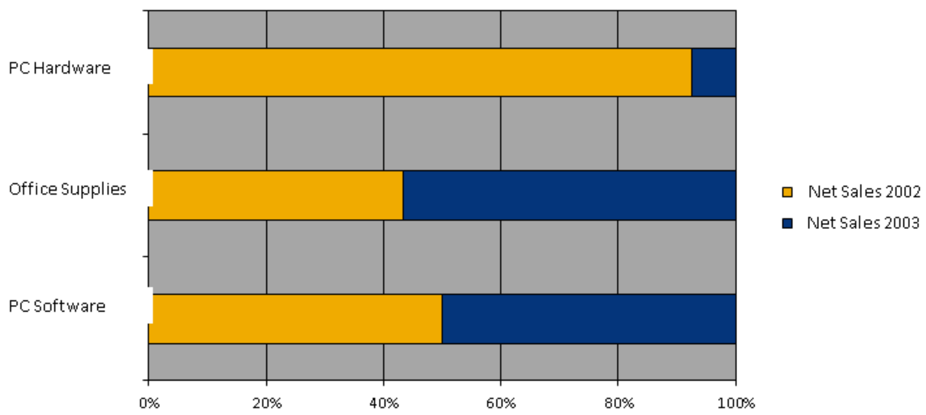
Stacked Bar

Shows comparisons between individual elements in a category. Categories are arranged vertically and values are arranged horizontally. The emphasis is on the comparison of values in a category.

You want to visualize the net sales value for 2002 and for 2003 for each product category.

The X axis shows net sales for 2002 and 2003.

The Y axis shows product categories.



Example of a stacked bar chart

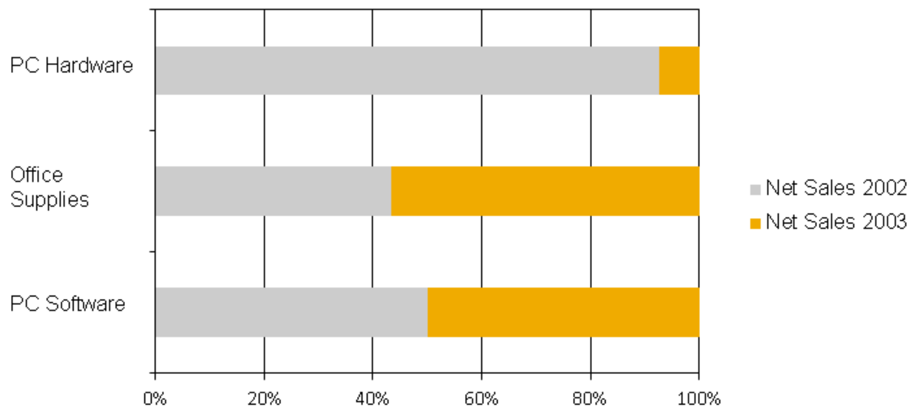
100 Percent Stacked Bar

Shows comparisons between individual elements in a category as a percentage. Categories are arranged vertically and values are arranged horizontally. The emphasis is on the comparison of values in a category as a percentage of the whole.

You want to visualize the net sales value for 2002 and for 2003 as a percentage of the total net sales for the two years for each product category.

The X axis shows net sales for 2002 and 2003.

The Y axis shows product categories.



Example of a 100 percent stacked bar chart

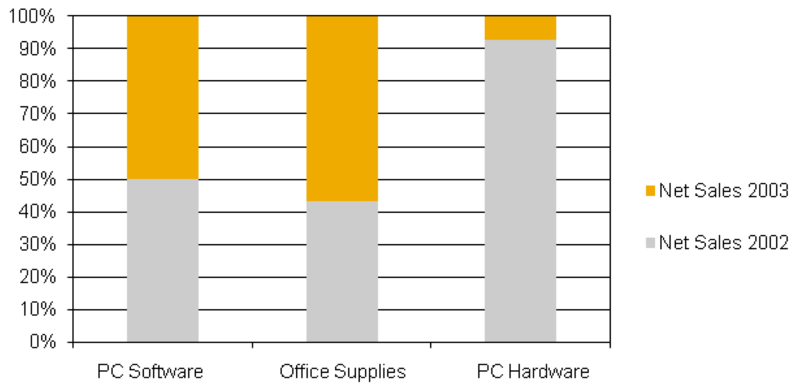
100 Percent Stacked Column

Shows comparisons between individual elements in a category as a percentage. Categories are arranged horizontally and values are arranged vertically. The emphasis is on the comparison of values in a category as a percentage of the whole.

You want to visualize the difference in net sales value between 2002 and 2003 for each product category.

The X axis shows product categories.

The Y axis shows net sales for 2002 and 2003.



Example of a 100 percent stacked column chart

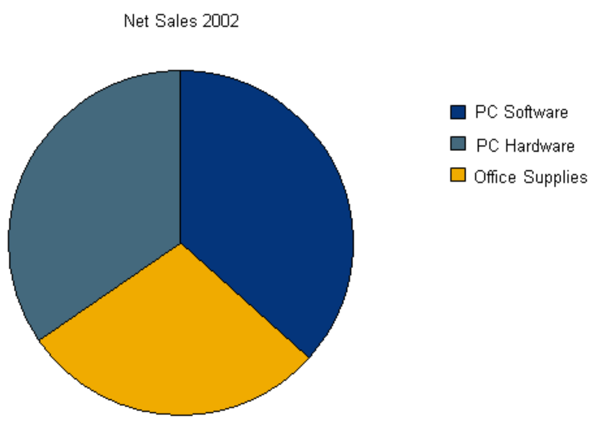
Pie

Shows values as pie segments. If the table contains more than one column, the additional columns are ignored when the table is converted into a chart. If the first column does not contain any values, the system does not convert the table into a chart.

The data as shown in table format is displayed in a line pie as follows:

- Segments represent values in rows.
- The size of the segments represent the values in columns as a percent.

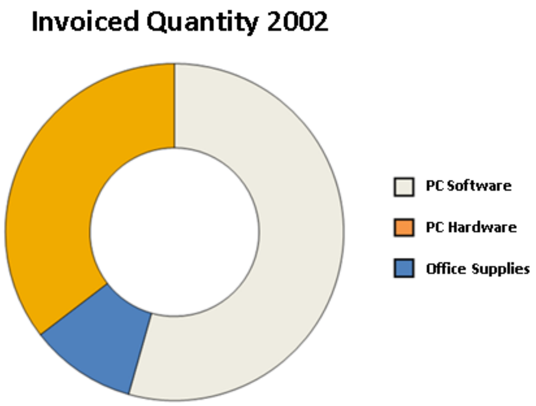
> You want to visualize the percent of total net sales value for each product category in 2002.



Example of a pie chart

Donut

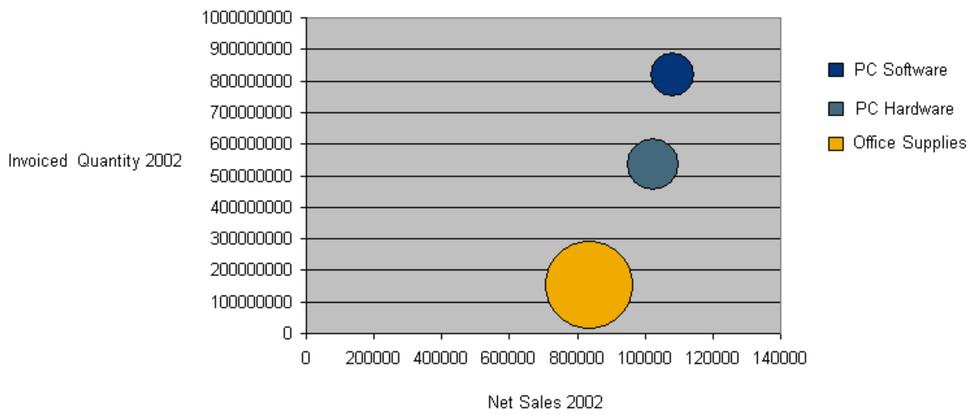
The donut chart is similar to a pie chart in that it shows values as segments. The segments represent values in rows. The size of the segments represent the values in columns as a percent of the whole.



Example of a donut chart

Bubble

Shows relationships between data set values by the size of the bubble.



Example of a bubble chart

Scatter

Shows relationships between values as displayed in several columns. Scatter charts are suitable for large sets of data.

The data as shown in table format is displayed in a scatter chart as follows:

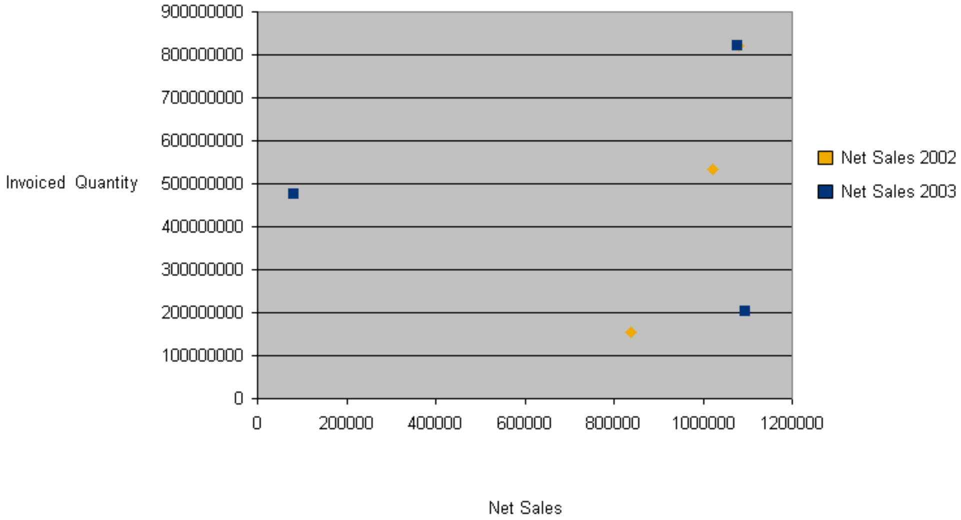
- The X axis shows the values in columns.
- The Y axis shows the values in columns.

You want to visualize the relationship between net sales value and invoiced quantity.

The X axis shows net sales.

The Y axis shows invoiced quantities.

Points in lines represent the intersection of the X and Y axes for product categories.



Example of a scatter chart

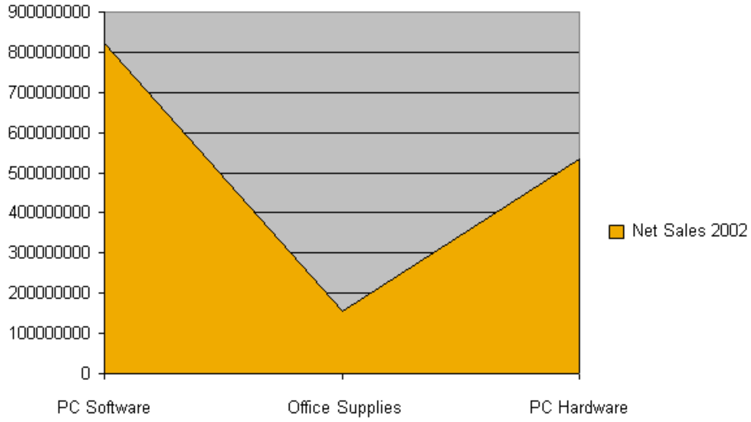
Area

Shows trends of values over categories. The area between the axes and the values are filled in an area chart.

The data as shown in table format is displayed in an area chart as follows:

- The X axis shows values in rows.
- The Y axis shows values in columns.

> You want to visualize a trend in your net sales value for 2002.
> The X axis shows product categories.
> The Y axis shows net sales.



Example of an area chart

7.12.1.3 Reporting

When working the reports, the reporting functions of screens built in HTML5 provide business users with easier access to everyday functions, such as filtering or adding or removing characteristics and key figures.

The layout of the report, whether table or chart, has been initially defined.

> Please note that this document is relevant only for HTML5-based screens. Either the described function is available only in HTML5, or its HTML5 version differs from the Microsoft Silverlight® version. To use this function in the Microsoft Silverlight client, please log on to the Microsoft Silverlight-based screen and follow the instructions in the corresponding help document.
>
> Your solution is HTML5-based if the system URL contains `/HTML5`. Your solution is Microsoft-Silverlight-based if a *Silverlight* pop-up window appears when you right-click anywhere on the screen.

Analzying Reports

Toolbar Functions

- *View*
  Shows the report view that is displayed in the Web browser. The dropdown list displays the report views that are available with the corresponding report. A report view is a modified view of the data available with a report. To view and edit the report view, click the pencil icon next to the dropdown list. The following table provides an overview of the available functions:

Function	Description
View dropdown list	Enables you to select a report view.
Report Default	Makes the current report view the default when opening the report.
Rename	Renames the current report view.
Delete	Deletes report views created by you. Note that you cannot delete report views delivered by SAP or report views created by your administrator.
Save	Save the report view .
Save As	Saves the current report view as a new report view.
Defer Refresh	If you want to make several changes to the report layout, we recommend deferring the refresh of the layout. When you click *Defer Refresh*, all other functions are inactive until you switch off *Defer Refresh*.
Add Fields	Add characteristic attributes to and remove them from the report view by clicking *Add Fields*. On the following screen, fields are group by specified criteria. For example, characteristics are grouped by dimensions. Note that you cannot select all fields to add to or to remove from the report view. Fields that you cannot select indicate that they are part of the report as it is defined, either as delivered content or as defined by administrators. When you add and remove fields, the system modifies the current report view. The characteristic attributes are then available. You can then add the new fields to rows and columns and save the personalized report view.
Available Fields	Shows the characteristics and key figures that are available with the report view. By clicking an available characteristic, a check is displayed next to the characteristic, and the characteristic is added to rows.

Function	Description
Row Fields	By clicking a characteristic under *Row Fields*, you can move the characteristic to *Column Fields* or back to *Available Fields*. You can also make settings for the characteristic. For information about characteristic settings, see here.
Column Fields	By clicking *Key Figure*, you can move the key figures to *Column Fields* or back to *Available Fields*. You can also make settings for the characteristic. For information about key figure settings, see here. You can also create exceptions and conditions. If you have an active condition, a filter icon appears next to the name of the report view. For information about exceptions, see here. For information about conditions, see here.

- *Selection*
  Shows the set of variables available for the report and any defined value selections currently used. The dropdown list shows the selection available with the corresponding report.
  To view and edit the selection, click the pencil icon next to the dropdown list. The following table provides an overview of the available functions:

Function	Description
Selection dropdown list	Enables you to choose a selection.
Report Default	Makes the current selection the default when opening the report.
View Default	Makes the current selection the default when opening the report view.
Rename	Renames the current selection.
Delete	Deletes the selection created by you. Note that you cannot delete selections delivered by SAP or created by your administrator.
Save	Save the current selection.
Save As	When you save a new selection, you have the option of saving the time characteristics of the selection as relative. By clicking *Save Time Characteristics as Relative*, the new values for time variables are calculated depending on the date when you saved the selection and when you next open the selection. The following graphic provides an example:  Example of saving time characteristics as relative
Show Description	You can also decide if you want to display text descriptions for values. For example, the *Project Status* variable has been restricted to the value 5. By clicking *Show Description*, under the entry field, the description Started is displayed.
Add Fields	Add characteristic attributes to and remove them from the report view by clicking *Add Fields*. On the following screen, fields are group by specified criteria. For example, characteristics are grouped by dimensions. Note that you cannot select all fields to add to or to remove from the report view. Fields that you cannot select indicate that they are part of the report as it is defined, either as delivered content or as defined by administrators. When you add and remove fields, the system modifies the current report view. The characteristic attributes are then available. You can then add the new fields to rows and columns and save the personalized report view.

For information about making value selection, see the section in this document called *Working with Selections*.

- Refresh
  By clicking the icon to the right of the *Selection* dropdown list, you can refresh the data and display of the report.
- Display Format
  You can switch formats between table and chart. Note that in some cases, you cannot switch the display format, for example, if your report contains a hierarchy.
- Further functions
  By clicking the sprocket icon, the following functions are available.

Setting	Description
Report Header	Displays values that have been set for variables in the selection. If available, any information and warnings are also displayed. For example, if the display currency is set using key figure settings or variables. By clicking *Technical Information*, you can also view further information, such as the access context of the report and the data source that serves as a basis for the report data.
Download	Exports the report data to Microsoft Excel® in XML format in read only mode. The export is useful if you want to use Microsoft Excel® functions to analyze report data. Note that when you open the export, there is no longer a connection to the system, even if you view the report data on the SAP add-in for Microsoft Excel® ribbon. You can also download data sources and reports in CSV format. The format and the available fields of the downloaded data source differ from a downloaded report. For example, in a downloaded report, the value and unit of measure are combined in one field whereas in the downloaded data source, the fields are separate. Another example is that there may be key figures only defined for the report, which are not available in the underlying data source.
Start Options	You can decide if you want to show the *Selection* area and if you want to start the report.

Setting	Description
Table Settings	• Freeze Header Columns You can freeze the headers of columns so that the headers are still displayed while scrolling. • Table Design You can choose between a standard white background or alternating between white and blue. • Grid lines You can decide if you want horizontal or vertical grid lines, both, or none. • Result Rows and Columns You can decide if you want result rows or columns displayed as the first or last entry in a row and/or displayed in the first or last column. • Display Repeated Texts You can specify whether every instance of a characteristic value is displayed in a row or column. • Display Scaling Factors Use the dropdown list to set a scaling factor of 1 to ten billion (10,000,000,000). • Arrange As Hierarchy The system arranges characteristics in rows and in columns as a hierarchy. The row or column further left serves as the tree structure into which characteristics to the right are inserted. • Hierarchy Design You can decide between standard and cascading. If you choose standard, characteristics are arranged in a hierarchy; any characteristic attributes are arranged in rows or columns. If you choose cascading, characteristics are arranged in a hierarchy; any characteristic attributes are arranged individual columns or rows. • Hierarchy Initial Expansion The hierarchy level up to which the hierarchy is to be displayed when it is expanded. • Invert Hierarchy The system inverts the hierarchy so that the hierarchy is displayed from bottom to top or from right to left. You can decide to invert a hierarchy in rows, columns, or both. • Limit Data By default, the records of data displayed are limited to the value in the specified field. You can change this value. Note that this setting is only valid for reports displayed as a table.
Chart Types	For information about the different chart types available, see Charts [page 105].
Send	You can send the report as an e-mail attachment or as a link.
Microsoft Excel®	You can view and edit the report using the SAP add-in for Microsoft Excel®.

Working with Selections

A selection consists of the set of variables available for the report and any defined value selections.

The selection you define determines the data to be displayed in the report.

When you open a report, the data displayed in the report is restricted to the value selections set using variables in the *Selections* area. You can display the *Selections* area by clicking the pencil icon next to the Selection dropdown list box.

Making Value Selections

Note that you must specify a value for all mandatory variables. In the system, mandatory variables are indicated by an asterisk (*).

The *Access Context* variable is mandatory for all reports. This variable is defaulted to the access context to which the you are assigned. The system fills the variable with the access context available for the report. In this case, only one access context is assigned, and therefore the variable is not displayed.

If the report supports multiple access contexts, you must specify which access context is to be used to select data.

You can either enter values manually, the system supports manual entry of only the ID of variable or characteristic values.

For example, you know that you want to restrict the *Supplier* variable to `500001` (You cannot enter `Miller and Son`). You therefore enter `500001` in the *Supplier* variable field.

You can add further values by clicking the plus icon to the right of the entry field. If the variable supports operators, such as greater than or less than, a dropdown list box is displayed.

Value Selection Help

The type of value entry allowed depends on how the content has been defined. For example, if you can select single values, multiple values, or set an interval.

The following options are available depending on the variable.

<table>
<tr><th>Allowed Value Entry</th><th>Description</th></tr>
<tr><td>Single value</td><td>Allows you to select one value.</td></tr>
<tr><td>One or more values</td><td>Allows you to select one or more values separated by semi-colons.</td></tr>
<tr><td>One or more values with an operator</td><td>Allows you to select one or more values with an operator such as greater than or less than. Note that the between operator is <code>..</code>, the unequal operator is <code><></code>.</td></tr>
<tr><td>Interval</td><td>Allows you to select a single or interval value, for example, 100 or 19494 .. 4343434.</td></tr>
<tr><td>Relative select</td><td>Allows you to restrict a specified characteristic to a relative variable selection. Relative selections are based on basic characteristics, such as Date, Week, Month, Fiscal Period, and Company. When you start the report, the system fills the cells in the report with the corresponding values.
Expand the following table to view some examples of relative selections.
<table>
<tr><th>Variable</th><th>Relative Selection</th><th>Description</th></tr>
<tr><td>Posting Date</td><td>Today</td><td>Shows today's date.</td></tr>
<tr><td>Invoice Creation Date</td><td>Last 7 Days</td><td>Shows a time range of the last 7 days, including today.</td></tr>
<tr><td>Fiscal Month</td><td>Current Fiscal Period</td><td>Shows the current month.</td></tr>
<tr><td>Company</td><td>Multiple Default Companies</td><td>Derives multiple default companies based on the user's position.</td></tr>
</table>
</td></tr>
</table>

When making value entries, note that you can choose either a relative select or other entries but not both.

Functions in the Content Area

Many of the functions in the content area of the report are available from the column headers of the report. The functions available differ for characteristics and key figures. To display the functions, click the column headers.

Functions for Characteristics

Function	Use
Sort	Click the arrow next to the characteristic to sort values in ascending or descending order. A period next to the characteristic indicates that the values are not sorted.
Display	Displays the description or ID of characteristic values. The name of the characteristic appears in a pop-up window. You can decide to display the description, ID, or a combination thereof. Note that the display function is disabled if only IDs are available to display.
Subtotals	Enables you to display or hide subtotal results of key figures for characteristics.

Function	Use
Filter	A list of characteristic values appears in a pop-up window. You can select one or more values by which to filter the report. You can also use the search with its auto-fill function to make it easier to find values. Once you have set a filter, a filter icon appears next to the name of the report view.
Add	Enables you to add a characteristic to the right of the column you click.
Remove	Enables you to remove characteristics. Note that in columns, one characteristic has to remain.

Functions for Key figures

Function	Use
Add	Enables you to add a key figure to the right of the column you click.
Remove	Enables you to remove the key figures, even those key figures that are initially defined. Note that one key figure has to remain.

Analytical Navigation

In cells of reports displayed in table format, you can use the context menu for further navigation and analysis. Using the context menu, you can view existing documents related to a value. When you click a cell, the documents and reports to which you can navigate are displayed. For example, you can navigate to a preceding document, such as a purchase request, an overview document that provides information about a customer, or to another report.

Working with Embedded Reports

Embedded reports are reports that you can find overview screens of work center views.

The following feature are available with embedded reports.

- Select different report views from the *View* dropdown list.
- Select different sets of saved value selections for variables from the *Selection* dropdown list.
- Refresh the data.
- From the sprocket icon, you can analyze the data of the report, set the refresh rate, and select a chart type.
- Switch between chart and table display.

7.12.2 About Analysis

Analytics reports condense data in your company so that you can recognize trends, compare sales results, and estimate future performance. You can display certain information from each report in different types of charts.

You can also download reports and run ad-hoc analyses, either in your Web browser or in Microsoft Excel.

Example

Sales manager Donna Moore checks the *Sales Summary* chart to see whether her team is on track to meet its total revenue goals for the current quarter. She notices that the numbers in the *Sales Summary* chart seem a little low when compared to the *Pipeline Forecast* chart. To improve her numbers for this quarter, she wants to find a way for her team to close more deals.

Donna checks the *Pipeline Funnel* chart and sees that many of the opportunities are in the initial stages. She examines the details of this chart in the Web browser and notices that there is a large percentage of revenue in the decision phase. She adds opportunity and account information to the chart for more detail, and sorts the list according to revenue so that she can pinpoint the revenue that is easiest to close. She saves this version of the report for future reference.

She notices that one of the high-revenue opportunities is supported by Michael Adams, a sales representative who is currently working on many deals. She thinks it might be useful to add another one of her top salespeople to this opportunity. She checks the *Sales Reps by Revenue in Pipeline (Top 10)* chart and finds that Richard Wilson currently has fewer deals in the pipeline, so he should have capacity to support Michael. She asks Richard to join Michael on this opportunity.

Ultimately, this move results in Michael and Richard closing the deal in the current quarter, improving the overall revenue for the quarter.

The following dashboards, made up of the charts listed here, are available in SAP Cloud for Sales, under *Analysis*.

Dashboards can be personalized. The table below lists the standard dashboard set up shipped with SAP Cloud for Sales.

Administrators can create custom reports that appear in the reports list. For more information, see Design Reports Quick Guide.

Dashboard	Charts	Description
Sales Overview	*Sales Summary*	Total expected revenue of won opportunities in the current year, quarter, and month
	Pipeline Forecast	Total expected revenue, separated by won and open opportunities closing in the current year
	Sales by Product Category (Top 10)	Top 10 product categories by total revenue share in won and open opportunities closing in the current year
	Competitors by Number of Deals Lost (Top 10)	Top 10 competitors by the number of opportunities lost over the last 12 months
Pipeline	*Pipeline Funnel*	Top 10 competitors by the number of opportunities lost over the last 12 months
	Pipeline by Month	Projected trend of expected revenue of opportunities closing in the next 12 months
	Pipeline Health Scorecard	Key metrics to evaluate the sales pipeline
	Pipeline Progress	Current progress of the pipeline, displaying stalled and on track opportunities
Win/Loss	*Win/Loss Rate*	Trend of win and loss rates over the last 12 months
	Win/Loss Revenue	Trend of expected revenue of opportunities that were won and lost over the last 12 months
	Loss Rate by Sales Phase	Rate of loss of opportunities during a given sales phase
	Win/Loss Reason	Number of wins and losses grouped by reason given for win/loss.

Dashboard	Charts	Description
Sales Performance	*Sales Reps by Revenue Won (Top 10)*	Top 10 sales representatives by total revenue for opportunities won in the last 12 months
	Sales Reps by Revenue in Pipeline (Top 10)	Top 10 sales representatives by total revenue for open opportunities closing in the next 12 months
	Average Sales Cycle	Average sales cycle length across all opportunities won in the last 12 months
	Sales Effectiveness Scorecard	Key metrics for evaluating the effectiveness of the sales force
Pipeline Sourcing	*Lead Qualification Rate*	Percentage distribution of qualified and unqualified leads over the last 12 months
	Lead Conversion Rate	Rate of conversion of leads to opportunities over the last 12 months
	Leads by Source	Distribution of leads by source and qualification level over the last 12 months
	Leads by Status	Distribution of leads by status over the last 12 months
Performance	*Sales Target vs. Pipeline*	Sales target versus opportunity pipeline for the current year
	My Opportunities (Top 20 by Expected Revenue)	Top 20 opportunities owned by the user, sorted by highest expected revenue
	My Progress	Consolidated view of a user's target, expected revenue and weighted revenue of opportunities in the current year
	My Opportunities (Top 20 by Closing Date)	Top 20 opportunities owned by the user, sorted by earliest close date
Forecast	*Forecast Metrics*	Comparison of forecast against target revenue, won revenue and override revenue (difference between pipeline revenue and forecast revenue for opportunities in submitted forecast)
	Forecast by Category	Sales forecasts distributed by forecast category
	Sales Target vs. Forecast	Sales target for the user versus the current submitted forecast
	Opportunity List	List of opportunities in a user's submitted forecast

Account View

The following charts appear in the Charts tab when you open an account:

- *Revenue Trend*
- *Average Sales Cycle*

Competitor View

The following charts appear in the overview information when you open a competitor:

- *Successful Sales Reps*
- *Won/Lost Trend*

Tasks

Personalizing Dashboards [page 122]

Viewing Reports with Web Browser — Quick Filter [page 232]

Viewing Reports with the Web Browser [page 229]

Working with Reports in Microsoft Excel

Working with Sales Planning Data [page 122]

7.12.3 Personalizing Dashboards

1. Click *Personalize* at the upper right of the screen.
   Choose *This Screen*.
   A list of dashboard reports appears, as well as mashups and web services. Use the filters to narrow the list, or use search to find a specific report.
2. Drag the report title from the list to the desired chart position.
   Drop on top of an existing chart to replace the chart currently in that position; drop between charts to insert the new chart between the existing charts.
3. Drag and drop to rearrange the charts as desired.
4. Click the wrench icon at the upper right of a chart to remove, rename, or resize the chart.
5. Click *Save* above the reports list to save changes.
   You can also click *Discard* to cancel changes and revert back to the previous version of the dashboard.
6. Click the X icon at the upper right of the report list to exit Personalize mode.

7.12.4 Working with Sales Planning Data

Under *Analysis*, three reports enable sales representatives to work with sales planning data that has been prepared by sales managers. The names and locations of these reports are as follows:

- The first report, *My Progress — Current Year*, appears in the *Pipeline Management* filter.
- The second report, *Sales Target/Pipeline by Month*, appears in the *Sales and Marketing — Sales* filter.
- The third report, *Sales Target/Pipeline by Sales Unit*, also appears in the *Sales and Marketing — Sales* filter.

To view these reports and work with their data, proceed as follows:

1. Choose *Analysis* > *Reports*.
2. Choose the sales planning report that you want to work with, as follows:
   - *Pipeline Management* > *My Progress — Current Year*
   - *Sales and Marketing — Sales* > *Sales Target/Pipeline by Month*
   - *Sales and Marketing — Sales* > *Sales Target/Pipeline by Sales Unit*
3. From the *Actions* column, open the report in the desired format.
4. Edit or manage the sales planning report data, as required, using your preferred settings.

> Sales planning functions are performed by sales managers in the *Sales Planning* work center. For more information, see Sales Target Planning [page 102].

7.12.5 Projecting Sales Volume

Use What-if Analysis to project sales volume or for tactical planning to meet sales targets. What-If Analysis helps you determine:

- Which opportunities to focus on in the short term
- Where to expand the portfolio to gain a higher average deal size
- The number of opportunities you need in the pipeline to meet sales targets

To use What-if Analysis, do the following:

1. Select the desired filters.
   The opportunities included in the simulation appear in the list below the chart.
2. Set the variables as desired using the sliders.
   The results of the simulation appear in the chart below.

Adjust the variables to achieve the desired outcome, then plan how to achieve those changes in your pipeline.

When using What-if Analysis, consider the following points:

- The maximum value for the Average Probability of Success is 100%, and you cannot lower the probability of success below the current average. If the current average for the opportunities included in your simulation is 100%, then the slider is inactive.
- Increasing either the *Average Probability* or the *Average Deal Size* slider results in a proportional increase of the simulated value of every opportunity. For example: if you increase the simulated average chance of success from 50% to 80%, the simulated value of each opportunity increases by 30%. This setting increases the simulated aggregated average chance of success to 80%, however, the simulated chance of success for each individual opportunity will not be set to 80%, rather the current value is increased by 30%.
- What-if Analysis uses two data sources for the simulation: opportunity pipeline data and sales target planning data. If you filter on a characteristic that is present in opportunities, but not in sales target planning data, (sales phase, progress, opportunity, calendar quarter, account) then the sales target planning data is excluded from the simulation. To ensure that the sales target planning data appears in the simulation result chart, include Not Assigned as a filter value for opportunity-only parameters.

7.12.6 Viewing Forecast Revenue

Use the forecast chart to compare forecast revenue with sales target revenue and won revenue.

To view the forecast revenue chart, do the following:

1. Choose *Analysis* > *Forecast*.
2. Use the filter to select opportunities to include in the forecast.
   You can filter on time period, owner, sales unit, territory, etc.

The chart area shows forecast revenue, target revenue, won revenue, and the difference between estimated revenue from pipeline-relevant opportunities and forecast revenue. The last figure (labeled Relevant Pipeline minus

Forecast) indicates the extent of override on pipeline revenue in the forecast. A positive value here indicates a conservative forecast, and a negative value indicates an optimistic forecast compared to pipeline revenue.

Opportunities used to generate the figures appear below the chart.

See Also

Forecasts [page 99]

7.13 Competitors

7.13.1 Competitors

On the *Competitors* tab, you can display existing competitors, create new competitors, and set competitor statuses. You can also display competitor details, review additional data, add and edit products in relation to competitors, and rename and edit competitors, as required.

Once you have created a competitor, it can no longer be deleted. You can, however, set its status as *Obsolete*.

As you review analytics charts and other sales data on the *Competitors* tab, it is important to remember that it compares your company's results only with the results of the selected single competitor.

For example, suppose you are a sales representative at company A, and you are examining the *Win/Loss Trends* chart in relation to company B, a key competitor. When you study this chart, it is important to remember that it only reflects two types of deals:

- Deals that company A won over company B
- Deals that company A lost to company B

In short, the chart reflects only those deals that company A won or lost in competition with company B, rather than all of the deals, as a whole, that company A has won or lost.

Tasks

Creating Competitors

1. Choose the *Competitors* tab.
2. Choose *New*.
3. Enter the *Name* and *Classification* of the competitor.
   If desired, you also may enter the competitor's Web site.
4. Save your entries.
   For a description of the available save options, see Save Options.

Editing Competitors

You can edit competitors from the *Competitor* item header, as follows:

1. Position the cursor over the information to be edited. For example, if you want to rename the competitor, position the cursor over the *Name* field.
   As you move the cursor over an editable field, the background changes to a different color. When you click a field, you enter edit mode.
2. Change the desired entries.
   Depending on the field, use the drop-down menu or automatic search to choose an entry.
3. Save your entries.
   For a description of the available save options, see Save Options.

> To assign a new competitor product to a competitor, choose the *Products* tab within the competitor details. On that tab, choose *New*, then enter the information for the competitor product.
>
> To edit information for an existing competitor product, exit the item details, then choose *Competitors* > *Competitor Products*.
>
> To edit information for an existing product of your own, exit the item details and the *Competitors* tab, then choose the *Products* tab and edit the product as described in the procedure above.

Choosing Competitor Filters

Competitors are displayed in one of three standard filters: *Active Competitors*, *Big Threat Competitors*, or *All Competitors*. You can modify the range of competitors to display by selecting among these filters. The default filter is *Active Competitors*.

Setting Competitor Status

From the competitor details, use the *Actions* menu to choose the following applicable status:

- Choose *Actions* > *Set as Active* to change the competitor status to Active.
- Choose *Actions* > *Block* to change the competitor status to Blocked, which will exclude the competitor from subsequent search results. By blocking a competitor you also prevent future opportunities from being assigned to it.
- Choose *Actions* > *Set as Obsolete* to change the competitor status to Obsolete. By setting a competitor as obsolete, you also prevent future opportunities from being assigned to it.

You may assign a new status to a competitor at any time, as required. For example, you can set any active competitor as obsolete, or any blocked competitor as active.

Reviewing Tabs in Competitor Details

From the competitor details, you can select these tabs to perform additional actions. The following table summarizes the tabs that are available:

Tab	Actions
Overview	Select *Overview* to see the latest updates made to the competitor, and any opportunities associated with the competitor.
Feed	Select *Feed* to read any Feed updates that are associated with this competitor. For more information, see About the Feed [page 25]. From this tab, you can also open, tag or flag Feed updates, mark them as favorites, or comment them.

Tab	Actions
Products	Select *Products* to view, edit or add products that are sold by your organization and that are comparable to products your competitor sells. For the selected competitor, the following product Information appears: • `Product ID` (of the competitor's product) • `Description` (of the competitor's product) • `Own Product ID` (of your product) • `Description` (of your product) • `Product Comparison` (for example, `Worse than ours`) • `List Price/Currency`
Opportunities	Select *Opportunities* to view potential sales opportunities that are in play with this competitor.
Attachments	Select *Attachments* to view, edit or add attachments that relate to this competitor.
SAVO	Select *SAVO* to view SAVO documents. If your administrator has not completed integration with SAVO, then this tab will not appear.

See Also

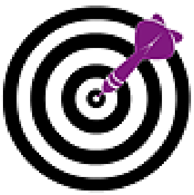
Competitor Products [page 126]

7.13.2 Competitor Products Quick Guide

The *Competitor Products* view enables you to create entries on competitor products and store and view detailed information on these products. You can access this view from the *Competitors* work center.

In this view, you can enter comparisons between competitor products and your products. This information is beneficial in positioning your products against the competitor. For example, if you are trying to sell a product to a customer, you can determine how your product is performing against the competition and develop presentations and demonstrations that highlight the benefits of your products over the competition.

On the initial screen, competitor products are displayed in *List View* by default. This and the *Tile View* provides you with the most detailed overview. Alternatively, you have the option to display competitor products in *Thumbnail View*, where you see the icon, name, and code.



Tasks

Create Competitor Products

1. In the *Action Bar*, click *New*.
   The *New Competitor Product* quick create window appears.
2. Enter the *Name*, *Competitor*, and *Our Product* in the appropriate fields. If additional information is available, you can add that as well.
3. Save your entries.
   The competitor product is added to the overview.

> You can also create competitor products by choosing the *New Competitor Products* option from the toolbar.

Display Competitor Products

In the overview, rest your cursor on any of the entered information.

The competitor product and its information is displayed in the *Quick View* window.

Edit Competitor Products

1. In the overview, or in the *Quick View* window, click the *Name* of the competitor product. The *Competitor Products Details View* opens.
2. In the *Headers View*, move the cursor over the field you want to edit and click the field.
3. Make changes to the field you want to edit.
4. Save your changes.

7.14 Partners

7.14.1 Partners

A motivated group of partners — such as resellers or brokers — can assist your organization in attaining its sales goals. To drive sales, you can enable sales teams within your organization to interact with your company's partners more efficiently.

Prerequisites

If your administrator has not configured the solution to display partners - which otherwise are accessed under *Partners* - then you cannot use the solution to collaborate with partners there.

Tasks

Creating Partners

1. Choose *Partners*.
2. Choose *New*.
3. Enter the *Name* of the partner, then specify its *Country*.
4. Save your entries.
   For a description of the available save options, see Save Options.

Editing Partners

You can edit partners from the *Partner* item header, as follows:

1. Position the cursor over the information to be edited. For example, if you want to rename the partner, position the cursor over the *Name* field.
   As you move the cursor over an editable field, the background changes to a different color. When you click a field, you enter edit mode.
2. Change the desired entries.
   Depending on the field, use the drop-down menu or automatic search to choose an entry.
3. Save your entries.
   For a description of the available save options, see Save Options.

See Also

Partner Contacts [page 128]

7.14.2 Partner Contacts

To facilitate the exchange of information, you can enable sales teams within your organization to communicate more easily with partner contacts — that is, individuals who are associated with the resellers or brokers with which your sales organization collaborates.

Prerequisites

If your administrator has not configured the solution to display partner contacts - which otherwise are accessed under *Partners* > *Partner Contacts* - then you cannot use the solution to collaborate with partner contacts there.

Tasks

Creating Partner Contacts

1. Choose *Partners* > *Partner Contacts*.
2. Choose *New*.
3. Enter the first and last name of the partner contact, then specify the e-mail address.
4. Save your entries.
   For a description of the available save options, see Save Options.

Editing Partner Contacts

You can edit partner contacts from the *Partner Contact* item header, as follows:

1. Position the cursor over the information to be edited. For example, if you want to rename the partner, position the cursor over the *Name* field.
   As you move the cursor over an editable field, the background changes to a different color. When you click a field, you enter edit mode.
2. Change the desired entries.
   Depending on the field, use the drop-down menu or automatic search to choose an entry.
3. Save your entries.

For a description of the available save options, see Save Options.

See Also

Partners [page 127]

7.15 Mobile Users

7.15.1 SAP Cloud for Customer for Android

With this mobile application, you can access many of the main functions of the system that have been tailored to business on-the-run. These include managing accounts, contacts, and activities; and viewing personalized reports. Changes made on your Android™ device are automatically updated in the system, over the Internet, online and in real time.

Information for Administrators

In the *Application and User Management* work center, ensure that for each mobile work center view to be accessed on a mobile device, the user of the mobile device is assigned the related desktop work center view. For further information on how to assign access rights to mobile users, refer to the *User and Access Management* document in the administrator section of the online help.

Eleven reports have been designated for mobile use in the standard system: *Leads by Status*, *Sales Effectiveness Scorecard*, *Lead Conversion Rate*, *Opportunity Pipeline Analysis*, *Sales Reps by Revenue Won*, *Sales Reps by Revenue in Pipeline*, *Average Sales Cycle*, *Pipeline Analysis for Next 12 Months*, *Pipeline Health Scorecard*, *Pipeline Funnel*, and *Sales Summary (Current Year)*.

You, as an administrator, can add an existing extension field to a mobile view. For more information, see Add an Extension Field to a Mobile Floorplan.

Installation Instructions

Device Prerequisites

This application has been optimized for use on Samsung Galaxy S™ and HTC Desire™ smartphones. Other Android devices should be able to run this application if they meet or exceed these minimum requirements:

- Operating system: Android 2.1
- Screen resolution: 800dp x 480dp
- CPU: 1GHz processor speed
- RAM: 512MB

Installation

If your device meets the above requirements, you can proceed to install the application by downloading the application directly from Google Play.

SAP does not warrant that the software and/or features as described herein will be available without interruption or permanently. SAP draws your attention to the fact that the availability is subject to the sole discretion of the operator of the app store. The operator of the app store may, at any time and without notice, restrict, interrupt, or prevent use of the software, or delete the software from your mobile device, or require SAP to do any of the foregoing actions.

Launching the Application

Launch the SAP Cloud for Customer application from your mobile device and log on using your user name and password. If this is the first time you are launching the application, proceed as follows:

1. Enter an application password.
   This is separate from your system user ID and password. You must supply your application password before accessing the system.
2. Choose *Options*.
3. Enter the URL to your system.
4. Set a *Remember App. Password* timeout, which is the amount of time your application password is valid on your device for the next log on. Due to security issues, you should ensure that this timeout meets your company's security guidelines. The default is *Never*, which clears the application password on log out.
5. Return to the logon screen to enter your system user name and password, and then choose *Log On*.

If you do not have the information required for these settings or you have continued problems logging on to the application, contact your system administrator for assistance.

Uninstalling the Application

You can uninstall the SAP Cloud for Customer application at any time, just as you would uninstall any other Android application on your device. For further information, refer to your device manufacturer's documentation.

For information on how to operate your mobile device, refer to the device manufacturer's documentation.

Views and further tasks

Searching and Navigating

When you call up an overview, the system automatically lists your items in alphabetical or chronological order. In many cases, you can switch to a list of all available items. You can filter any list by entering a search term manually.

Access actions for each screen from the device's menu button. Use the device's back button to navigate back to a previous view.

Log off by pressing the device's back button from the Home screen.

When you edit data in the application, you must manually save changes (touch the device's menu button and choose *Save*). If you use the device's back button before you save your changes, you may lose all unsaved data.

Feed

Use the filters on the Feed overview to select the feed updates you wish to view: All, System, People, or Private. To create a new feed update, press the menu button and choose *New*. To post your new update, choose *Save and*

Close. Choose an update to view details. From the details view you can comment on the update and open mentioned items.

> You cannot mention people or items, send private updates, or tag feed updates created on your Android device.

Accounts

You can display, edit and create accounts.

In the *Accounts* view, a yellow or red light next to an account indicates the status of the account in the system: a yellow light indicates that the account is in preparation and the red light indicates that the account is blocked. A yellow or red light does not stop you from processing the account on your mobile device.

In the overview, account address information and communication details are displayed in the *General* tab. Use the device's menu button to display available actions.

Using the *Contacts* and *Activities* tabs, you can search for, display, and edit related contacts or related activities for the account. Select the contact or activity to open an overview. Here you can access contact information and communication details, as well as activities related to this specific contact, or to the account in general.

Choose *ERP Docs* to view sales quote or sales order documents generated by your SAP ERP system. Note: this tab does not contain any data unless your system has been configured to integrate sales documents from your SAP ERP system.

Opportunities and Leads

You can display, edit and create opportunities and leads.

In the *Opportunities* and *Leads* views, you can access worklists of opportunities and leads.

Select one to check the details, change data, or create related follow-up activities and documents.

You can also, for example, accept or decline a lead that has been assigned to you, create an opportunity from a lead, change the chance of success, or status, of an opportunity, or follow feed updates for a lead or opportunity.

For opportunities, choose *ERP Docs* to view sales quote or sales order documents generated by your SAP ERP system. Note: this tab does not contain any data unless your system has been configured to integrate sales documents from your SAP ERP system.

Contacts

You can display, edit and create contacts.

Contact address information, communication details, and activities are displayed in the overview. Use the smartphone's menu button to change a contact's general data or *Add* to create a contact by entering the contact's name, address, communication details and more.

If you create a new contact for an existing account, you can search for and select the account ID of the account in the *Account/Partner* field.

If there is a photo of the contact in the system, it is automatically displayed.

Activities

You can display, edit and create activities.

In the overview, use the menu button and select *Edit* to change an activity. The system proposes values for many of the fields, for example: organizer, dates and times, category, and priority. You can manually change these values and search for and select other values, such as the account and the contacts for the activity.

Today's Appointments

You can display, edit and create appointments.

In the *Today's Appointments* view, you can review and edit your appointments for the current and next day.

Reports

Select a report to open the report and display it in graph form. In the graph view, you can select each bar to view its values and description.

Use the menu button to edit a report and then sort and filter it. You can also zoom in (magnify) or switch between graph and table display.

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7.15.2 SAP Cloud for Customer for BlackBerry

With this SAP Cloud for Customer mobile solution, you can access the main functions of the system that have been tailored to business on-the-run. These include managing accounts, contacts, and activities; forwarding tasks; and viewing personalized reports. Changes made on your BlackBerry® are automatically updated in the system over the Internet, online and in real time.

Information For Administrators

In the *Application and User Management* work center, ensure that for each mobile work center view to be accessed on a mobile device, the user of the mobile device is assigned the related desktop work center view.

Eleven reports have been designated for mobile use in the standard system: *Leads by Status*, *Sales Effectiveness Scorecard*, *Lead Conversion Rate*, *Opportunity Pipeline Analysis*, *Sales Reps by Revenue Won*, *Sales Reps by Revenue in Pipeline*, *Average Sales Cycle*, *Pipeline Analysis for Next 12 Months*, *Pipeline Health Scorecard*, *Pipeline Funnel*, and *Sales Summary (Current Year)*.

> You, as an administrator, can add an existing extension field to a mobile view. For further information, see Add an Extension Field to a Mobile Floorplan.

Installing The Application

Install the SAP Cloud for Customer Application for BlackBerry by downloading the application directly from BlackBerry App World™.

Start the application on your device then proceed as follows:

1. Enter an application password.
   This is separate from your system user ID and password. You must supply your application password before accessing the system.
2. Choose *Options*.
3. Enter the *URL* to your system.
4. Set a *Remember App. Password* timeout, which is the amount of time your application password is valid on your BlackBerry for the next log on. Due to security issues, you should ensure that this timeout meets your company's security guidelines. The default is *Never*, which clears the password when you log off.
5. Return to the logon screen to enter your system user and password, and choose *Log On*.

If you do not have the information required for these settings or you have continued problems logging on to the application, contact your system administrator for assistance.

SAP does not warrant that the software and/or features as described herein will be available without interruption or permanently. SAP draws your attention to the fact that the availability is subject to the sole discretion of the operator of the app store. The operator of the app store may, at any time and without notice, restrict, interrupt, or prevent use of the software, or delete the software from your mobile device, or require SAP to do any of the foregoing actions.

Getting Support

To get support for technical errors, follow this standard support process. First, activate logging in the *Support* section of the *Settings* screen, then reproduce the problem. The application automatically creates, saves, and attaches the log to an e-mail, and proposes an e-mail address if you have set one as default. Choose *Send Support Information* to complete and send this e-mail to your local administrator, who can then try to assist you before contacting SAP Support. Ensure that you deactivate logging when you are done, as the logging function may impair performance on your BlackBerry.

Searching And Navigating

When you call up an overview, the system automatically lists your documents or other records in alphabetical or chronological order. In many cases, you can switch to a list of all available documents or other records.

You can search any list by entering a search term manually. The application supports a wild card search with asterisks (*). Simply select an entry in the results list to close the search and automatically copy the value to the field.

Most views include filter buttons above the results list. These buttons let you display, for example items belonging to you, or to your team.

Note that multitasking is not always supported. To carry out some tasks, for example making a phone call from the account overview, you must exit the application. To return, you will have to log on again.

Use the BlackBerry Menu key to access functions such as creating a new item or setting display options for reports.

For more information, refer to the BlackBerry documentation.

Feed

Use the filters on the Feed overview to select the feed updates you wish to view: All, System, People, or Private. To create a new feed update, press the BlackBerry menu key and choose *New*. Post your new update by choosing *Save and Close*. Choose an update to view details. From the details view you can comment on the update and open mentioned items.

You cannot mention people or items, send private updates, or tag feed updates created on your BlackBerry.

Accounts

You can display, edit and create accounts.

In the *Accounts* view, a colored indicator next to an account shows the status of the account in the system: a green light indicates that the account is active; a red light indicates that the account is blocked. A grey or unlit indicator means the account is obsolete. A red indicator does not stop you from processing the account on your BlackBerry.

In the overview, account address information and communication details are displayed on the *General* tab. Choose the address to display it in Google Maps. You can also:

- Call a customer by choosing the telephone number
- Send an e-mail by choosing the e-mail address
- Open the account website by choosing the hyperlink

On the *Contacts* and *Activities* tabs, you can search for, display, and edit contacts or activities for the account. Select the contact or activity to open an overview. Here you can access contact information and communication details, as well as activities related to this specific contact, or to the account in general.

Choose *ERP Docs* to view sales quote or sales order documents generated by your SAP ERP system. Note: this tab does not contain any data unless your system has been configured to integrate sales documents from your SAP ERP system.

Opportunities and Leads

You can display, edit and create opportunities and leads.

In the *Opportunities* and *Leads* views, you can access worklists of opportunities and leads.

Select one to check the details, change data, or create related follow-up activities and documents.

You can also, for example, accept or decline a lead that has been assigned to you, or change the chance of success, or status, of an opportunity, or follow feed updates for a lead or opportunity.

For opportunities, you can choose *ERP Docs* to view sales quote or sales order documents generated by your SAP ERP system. Note: this tab does not contain any data unless your system has been configured to integrate sales documents from your SAP ERP system.

Contacts

You can display, edit and create contacts.

Contact address information, communication details, and activities are displayed in the overview. Choose *Edit* to change a contact's general data or *Add* to create a contact by entering the contact's name, address, communication and other details.

If you create a new contact for an existing account, you can search for and select the account ID of the account in the *Account/Partner* field.

Activities

You can display, edit and create activities.

In the overview, choose *Edit* to change an activity. You can also create a new one by choosing *Add* and selecting the relevant activity type. The system proposes values for many of the fields, for example: organizer, dates and times, category and priority. You can manually change these values, and search for and select other values, such as an account and contacts for the activity.

Today's Appointments

You can display, edit and create appointments.

In the *Today's Appointments* view, you can review and edit your appointments for the current day. You can also add new appointments here.

Reports

Select a report to open the report and display it in graph form.

Choose *Edit* to filter the report by date, activate and deactivate the filter, and sort the report values in ascending or descending order.

Choose *Choose* to review and activate your default or personalized views on the report, and to select a variant.

To zoom in and display the values for a highlighted area of the graph, select an area on the graph and choose the magnifier. The magnifier has a display on two levels. On the top level, you can scroll right or left in the graph. On the bottom level, you can scroll up and down on the values and key figures.

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7.15.3 SAP Cloud for Customer for iPad

With this SAP Cloud for Customer mobile solution, you can access the main functions of the system that have been tailored to business on the go. These include managing feed updates, accounts, contacts, activities, leads, opportunities, appointments, competitors, groups, products, and employees. Changes made on your iPad are automatically updated in the system over the Internet in real time. The Analysis feature uses worksheets to arrange and organize reports that you often need, compare versions, and highlight changes in data.

Installing The Application

Install SAP Cloud for Customer for iPad from the iTunes Store. Launch the application, and select *Options* on the log on screen and do the following:

- Enter the *URL* for your backend system.
- Set a *Credential Timeout*, which is the period of inactivity before automatic log off. Due to security issues, you should ensure that this timeout meets your company's security guidelines. The default is five minutes.
- SAP recommends that you enable the Passcode Lock on your iPad when using SAP Cloud for Customer (In the iPad *Settings* app, *General* section).

Return to the logon screen to enter your user and password, and choose *Log On*.

If you do not have the information required for these settings or you have problems logging on, contact your system administrator.

SAP does not warrant that the software and/or features as described herein will be available without interruption or permanently. SAP draws your attention to the fact that the availability is subject to the sole discretion of the operator of the app store. The operator of the app store may, at any time and without notice, restrict, interrupt, or prevent use of the software, or delete the software from your mobile device, or require SAP to do any of the foregoing actions.

Getting Support

To get support for technical errors, use the following standard support process:

1. Open the Settings window by selecting *Options* on the log on screen.
2. Activate logging in the *Support* section of the *Settings* window.
3. Reproduce the problem. The application automatically creates, saves, and attaches the log to an e-mail, and proposes an e-mail address if you have set one as default.
4. Return to the Settings screen, and choose *Send Log* to complete and send this e-mail to your local administrator, who can then try to assist you before contacting SAP support.
5. Deactivate logging when you are done, as the logging function may impair performance on your iPad.

You can also report issues directly in the system from a Web browser on your personal computer. To report an issue via a Web browser, do the following:

1. Capture any screens you wish to include on your iPad with the built in capture function (press power and home keys simultaneously).

2. Copy the screen images to your personal computer.
3. Log on to the system from a Web browser on your personal computer.
4. Choose *Help* > *Report an Incident*.
5. For the component, enter `LOD-CRM-MOB-IPD`.
6. Enter the required information and describe your issue in detail.
7. Deselect *Screenshot Relevant*.
   The system automatically captures a screen image for you, but it is not needed in this case.
8. Go to the next screen by choosing *Next*.
9. To add your screen image files, choose *Add*.
10. To send the incident report, choose *Finish*.

Security

We recommend setting a passcode lock for your device, especially if the Store Data option is enabled. Note that this option is enabled by default. If you decide not to store data, the Analysis functionality is limited.

To delete stored data, do the following:

1. Close the SAP Cloud for Customer application.
2. Restart the app.
3. Choose Options on the log on screen, and make the relevant changes to the SAP Cloud for Customer settings.
4. Close the settings window, and log on.

Views and Further Tasks

> You may see some or all of the views described in the following sections, depending on how your user is configured in your system.

Feed

Feed is where you post and receive updates on your sources – the information and people that you need to complete your work.

Feed updates are presented differently than other information in the system to optimize communications and collaboration with your colleagues. In the feed, you can post and delete your own updates, view a list of automatic updates from sources that you select and add comments to updates. Updates are displayed in sequential order with the most recent update at the top of the feed.

You can post updates from the Feed or from an item details screen by selecting the *Update* icon in the top toolbar.

To comment on a feed update, choose the *Actions* icon in the feed update, then select *Add Comment*.

To delete a feed update you have posted, choose the *Actions* icon in the feed update, then select *Delete Update*.

To follow a person or item, choose the *Follow* icon in the item quick view or item header. The follow icon turns blue to indicate that you are now following the person or item.

To stop following a person or item, choose the blue *Follow* icon and the icon turns grey to indicate that you are no longer following the person or item.

You can use search and filters in the Feed view to narrow the list and find specific updates.

> You cannot mention people or items, send private updates, or tag feed updates created on your iPad.

Navigating and Searching

SAP Cloud for Customer for the iPad provides several views – work areas grouped by function. Select a view from the *Views* menu at the upper left of the screen. The name of the current view appears at the top center of the screen.

Access views with the buttons at the upper left of the screen. Choose the top button to display the button labels.

When you select a view, the system displays a list of items. You can search the list for a specific item or narrow the list by selecting a filter.

- To search in a list of items, use the search box at the top of the list.
- To apply a filter, choose the filter button above the list. The button name shows the current filter.
- To load more items, scroll to the bottom of the list, then choose *more items*.

In List layout, a short summary of the selected item appears on the right side of the screen.

- To view complete item details, choose *View Details* in the summary.

In certain views (such as Accounts and Contacts) you also have the option of viewing items in the list by their location on a map.

- To view items on a map, choose *Layout* > *Map*.
- Choose an item in the list or a pin on the map to view item summary information.
- Choose the crosshairs icon to center the map on your current location.
- Choose the tab button at the right of the list to hide or show the list, and see more or less of the map.

To quickly access detailed item information do the following:

1. Choose the view containing items of the desired type (Account, Opportunity, etc.)
2. Select the desired item in the list. Use filters or search to find the item. Remember, you can load more items with the button at the bottom of the list.
3. Choose *View Details* in the summary area.

Tap the *Edit* button at the top right of the item details screen to edit the information in the *Details* tab.

Also located at the top right of the item details screen, is the *Actions* button. The commands in the *Actions* menu vary depending on the type of item you are viewing.

Choose the *Update* button at the top right of the item details screen to post a feed update associated with the current item

Use the tools buttons at the lower left of the screen to create items, access flagged and favorite items, view tags or access analytics.

Choose *Quick Create* to create new leads, competitor products, campaigns, contacts, competitors, groups, phone calls, accounts, appointments, tasks, target groups and opportunities.

Access favorites and flagged items by choosing the *Shelf* button in any view. Access tags by choosing the *Tags* button.

Below the item name on the item details screen you'll find buttons for the following four functions:

- Flag
- Mark as Favorite
- Follow
- Tag

These buttons also appear in the item summary area of the list and map layouts.

Choose the Help button in the upper right corner of any screen to view this help document.

Customers

Customers groups together Accounts and Contacts views.

Accounts

In the *Accounts* view, you can display account overviews and account detail views, rename accounts, and edit account data. You can also locate accounts on a map, and view accounts near your current location.

To switch between map view and list view, choose *Layout* and select *List* or *Map*. The map view defaults to show your current location. You can browse the map to view other accounts. To center the map at your current location, choose the crosshairs icon above the map. To view an account location when viewing the map, choose an account in the list.

The pin color on the map indicates the following:

- Yellow: Your current location
- Blue: Accounts in the list currently visible on the map
- Red: Selected account

For a quick summary of account information when viewing accounts as a list, choose an account in the list. The summary appears on the right side of the screen. Tap *View Details* to open the account item view.

> You can attach a photo to any item that allows attachments.

From the account details screen, you can select from the following tabs for an account:

Tab	Actions
Details	View account details such as account name, status, and contact information.
Overview	Get a summary of important account information such as latest updates, account team members, and account address.
Feed	Read any feed updates that are associated with this account. You can also comment on feed updates here.
Activities	View activities that are associated with this account. You can also create appointments and tasks.
Account Team	Add employees to, or delete employees from the team responsible for this account. You can also modify the role of any employee assigned to this account.
Relationships	View defined interactions between this account and other entities, for example other accounts, or contacts.
Addresses	View, or add addresses that are associated with this account. You can also set the main address for the account. When adding an address, you can indicate that the address may be used for shipping or billing.
Contacts	Add contacts to, or remove contacts from, this account. You can also designate a contact as the Primary Contact for the account.
Campaigns	View campaigns.
Sales Leads	View or create leads that relate to this account.
Opportunities	View or create potential sales opportunities that relate to this account
Attachments	View attachments that relate to this account.
Tickets	View tickets associated with this account.
Target Groups	View target groups
Registered Products	View registered products for this account

Contacts

You can view contacts as a list or on a map (see Accounts above for more information on the map layout). To display a quick summary on the right of the screen, select a contact. To open the contact item view, choose *View Details*.

Contact information, communication details, recent feeds and addresses are displayed in the overview. To change a contact's general data choose *Edit*. Add a contact from any view by choosing the *Quick Create* button.

Use the *Actions* menu at the top right of the screen to set a contact as active or obsolete or to block a contact.

From the details screen, you can select the following tabs for a contact:

Tab	Actions
Details	View details such as contact name, status, and address.
Overview	Get a summary of important information such as latest updates and addresses.
Feed	Read any feed updates that are associated with this contact. You can also comment on feed updates here.
Addresses	View addresses that are associated with this contact.
Activities	View or add activities associated with this contact.
Sales Leads	View leads that relate to this contact.
Opportunities	View potential sales opportunities that relate to this contact.
Registered Products	View registered products for this contact.
Campaigns	View campaigns
Marketing Interactions	View the history of marketing interactions with this contact.

People

People groups together Employees and Groups views.

Employees

Employees appear in a list on the left. Your employee record appears at the top of the list. Use search and filter to narrow the list, or find a specific employee. Select an employee to see summary information on the right of the screen.

From the overview, you can select the following tabs for an employee:

Tab	Actions
Details	View employee details such as department, manager, and contact information
Overview	Get a summary of important information such as latest updates, group membership, and followers.
Feed	Read any feed updates posted by this employee. You can also comment on feed updates here.
**Following*	View people and items you are following. (*only appears on your own employee record)
**Followers*	See who is following you. (*only appears on your own employee record)
Groups	View groups to which this employee belongs. If you are viewing your own employee record, you can also create new groups.
Collaboration	Shows SAP JAM groups that include the employee as a member.

Groups

Groups displays a list of SAP Jam groups. For more information, select a group in the list and choose *View Details*. This opens the SAP Jam page in a browser window. You can find more information on using SAP Jam groups here .

Legacy Groups

Groups appear in a list on the left. Use search and filter to narrow the list, or find a specific employee. Select an employee to see summary information on the right of the screen.

To join a public group or request access to a private group, choose the follow icon. Add a group from any view by choosing the *Quick Create* button.

View group details by choosing *View Details*. If you belong to a group, or are the owner of the group you can view additional tabs on the details screen.

From details screen, you can select the following tabs for a group:

Item View	Actions
Details	View group details such as name, type, and owner information
Overview	Get a summary of important information such as latest updates, attachments, and members.
**Feed*	Read and post feed updates associated with this group. You can also comment on and delete group feed updates here. (*only appears for groups you have created, or to which you belong)
**Members*	View, approve, and add or remove group members. You can also view member details. (*only appears for groups you have created, or to which you belong)
**Attachments*	View and add attachments that relate to this group. (*only appears for groups you have created, or to which you belong)

Marketing

Marketing groups together Campaigns, Target Groups, and Marketing Leads views.

Campaigns

Campaigns appear in a list on the left. Use search and filter to narrow the list, or find a specific campaign. To display a quick summary on the right of the screen, select a campaign. To open the campaign details screen, choose *View Details*.

From the campaigns details screen, you can select from the following tabs for a campaign:

Tab	Actions
Details	View campaign details such as name, type and target group.
Overview	Get a summary of important account information such as latest updates, response options, and activities, leads, and Opportunities generated by this campaign.
Feed	Read any feed updates that are associated with this campaign. You can also comment on feed updates here.
Response Options	View, add and edit response options for this campaign.
Execution Details	View information on the deployment of this campaign.
Respondents	View the responses generated by this campaign.
Marketing Leads	View marketing leads generated by this campaign.
Sales Leads	View sales leads generated by this campaign.
Opportunities	View potential sales opportunities that are generated by this campaign
Sales Quotes	View and add sales quotes related to this campaign.
Activities	View activities that are associated with this campaign. You can also create phone calls and e-mails.
Attachments	View attachments that relate to this campaign.

Target Groups

Target groups are used to segment your market and to target the right customers or prospects for each campaign. You create target groups with members from your existing customer and prospect database.

Target groups appear in a list on the left. Use search and filter to narrow the list, or find a specific target group. To display a quick summary on the right of the screen, select a target group. To open the target group details screen, choose *View Details*.

From the target groups details screen, you can select from the following tabs for a target group:

Tab	Actions
Details	View target group details such as name, status and notes.
Overview	Get a summary of important account information such as latest updates and members of this target group.
Feed	Read any feed updates that are associated with this target group. You can also comment on feed updates here.
Members	View and edit details of members of this target group.
Campaigns	View campaigns associated with this target group.

Choose the *Actions* button to set the target group status, create a new campaign for this target group or copy the group.

Marketing Leads

Use the *Marketing Leads* view to manage your leads.

To display a quick summary on the right of the screen, choose a lead. To open the lead details screen, choose *View Details*.

From the details screen, you can select the following tabs for a lead:

Tab	Actions
Details	View lead details such as account, primary contact and status.
Overview	Get a summary of important information such as latest updates, contacts and products associated with this lead.
Feed	Read any feed updates that are associated with this lead. You can also comment on feed updates here.
Products	View, add, or remove products that relate to this lead.
Activities	View activities that are associated with this lead. You can create and manage appointments, tasks, phone calls and e-mails.
Conversion	Shows objects to which this lead has been converted. For example, Sales Leads or Opportunities.
Attachments	View and add attachments that relate to this lead.

Sales

Sales groups together Sales Leads, Opportunities, and Sales Quotes views. Note that you will find more information about Leads under Marketing, above.

Sales Leads

Use the *Sales Leads* view to manage your leads.

To display a quick summary on the right of the screen, choose a lead. To open the lead details screen, choose *View Details*.

From the details screen, you can select the following tabs for a lead:

Tab	Actions
Details	View lead details such as account, primary contact and status.
Overview	Get a summary of important information such as latest updates, contacts and products associated with this lead.
Feed	Read any feed updates that are associated with this lead. You can also comment on feed updates here.
Products	View, add, or remove products that relate to this lead.
Activities	View activities that are associated with this lead. You can create and manage appointments, tasks, phone calls and e-mails.
Contacts	Add or remove contacts that relate to, this lead. You can also designate a contact as the primary contact for this lead.
Sales & Marketing Team	Add or remove marketing team members for this lead. You can designate an employee as the employee responsible for this lead.
Involved Parties	Add or remove other employees or contacts who play a role in the lead.
Opportunities	View opportunities created from this lead.
Attachments	View and add attachments that relate to this lead.

You can accept or decline a lead that has been assigned to you by choosing the *Actions* button at the top right of the screen and selecting *Accept* or *Decline*.

Convert a qualified lead to an opportunity by choosing the *Actions* button at the top right of the screen and selecting *Convert to Opportunity*.

Opportunities

In *Opportunities* you can view and edit opportunities. Opportunities represent potential sales. You can add competitors to opportunities. This information can be used later in analysis.

To display a quick summary on the right of the screen, choose an opportunity. To open the opportunity details screen, choose *View Details*.

Use the *Actions* menu in the item header to request a sales quote, or a sales order, or to set the status of the opportunity.

From the details screen, you can select the following tabs for an opportunity:

Item View	Actions
Details	View opportunity details such as account, primary contact and status.
Overview	Get a summary of important information such as latest updates, contacts and products associated with this opportunity.
Feed	Read any feed updates that are associated with this opportunity. You can also comment on feed updates here.
Products	View, add, or remove products that relate to this opportunity.
Sales Activities	View activities associated with this opportunity. You can create and manage appointments, tasks, phone calls and e-mails.
Competitors	View, add, or remove competitors that relate to this opportunity.
Sales Team	Add employees to, or remove employees from the team responsible for this opportunity. You can also assign the employee responsible for this opportunity.
Contacts	Add or remove contacts that relate to, this opportunity. You can also designate a contact as the primary contact for the opportunity.

Item View	Actions
Involved Parties	View other employees or contacts who play a role in the opportunity.
Attachments	View attachments that relate to this opportunity.
**Sales Documents*	View sales quote or sales order documents generated by your SAP ERP system. (*only available with SAP ERP integration)

Create an opportunity from any view by choosing the *Quick Create* icon.

Close an opportunity by choosing the *Actions* button at the top right of the screen, and selecting a status option.

Sales Quotes

In *Sales Quotes* you can view and edit sales quotes.

To display a quick summary on the right of the screen, choose a sales quote. To open the quote details screen, choose *View Details*.

Use the *Actions* menu in the header to submit or copy the sales quote, set progress, or preview the current quote in Adobe Acrobat (PDF) format.

From the details screen, you can select the following tabs for a sales quote:

Item View	Actions
Details	View quote details such as account, primary contact and status.
Overview	Get a summary of important information such as latest updates, involved parties and products associated with this sales quote.
Products	View, add, or remove products from this quote.
Involved Parties	View, add or remove other business partners who play a role with this sales quote.
Sales Documents	View and create related sales quotes.
Attachments	View and add attachments that relate to this quote.
Activities	View activities associated with this quote. You can view e-mails, and create and manage appointments, tasks, phone calls.
Feed	Read any feed updates that are associated with this quote. You can also comment on feed updates here.

Create a new sales quote from any view by choosing the *Quick Create* icon.

Submit a quote by choosing the *Actions* button at the top right of the screen, and selecting *Submit*.

Activities

Activities groups together Appointments, E-Mails, Phone Calls and Tasks views.

Appointments

Appointments appear in a list on the left. Use search and filter to narrow the list, or find a specific appointment. Select an appointment to see summary information on the right of the screen. To open the appointment details screen, choose *View Details*.

Add a task from any view by choosing the *Quick Create* button

From the details screen, you can select the following tabs for an Appointment, or other activity type:

Tab	Actions
Details	View activity details such as status, time and date and account.

Tab	Actions
Overview	Get a summary of important information such as latest updates, attachments and attendees associated with this activity.
Feed	Read any feed updates that are associated with this Activity. You can also comment on feed updates here.
Related Items	View and add related items and follow-up items to the activity.
Notes	View notes for this activity.
Attachments	View and add attachments for this activity. For appointments, find summaries here.

To change an appointment's details, choose *Edit*. Add an appointment from any view by choosing the *Quick Create* button.

Use the *Actions* menu in the item header to set the status of the appointment — in process, or complete. You can also generate a summary, which is added to the *Attachments* tab as a PDF document that you can view, print, or forward via e-mail.

You can manage E-Mails, Phone Calls, and Tasks the same way as Appointments, described above.

Competitors

The Competitors button groups together Competitors and Competitor Products views.

Competitors

Competitors appear in a list on the left. Use search and filter to narrow the list, or find a specific competitor. To display a quick summary on the right of the screen, choose a competitor. To open the competitor details screen, choose *View Details*.

To change a competitor's general data choose *Edit* from the details tab. Add a competitor from any view by choosing the *Quick Create* tool.

Choose *Actions* at the top right of the screen to set a competitor as active or obsolete or to block a competitor.

From the overview, you can select the following item views for a competitor:

Item View	Actions
Details	View competitor details such as status, classification and contact information.
Overview	Get a summary of important information such as latest updates and opportunities associated with this competitor.
Feed	Read all feed updates that are associated with this competitor. You can also comment on feed updates here.
Products	View, and manage products that are associated with this competitor.
Opportunities	View potential sales opportunities that you are trying to win from this competitor.
Attachments	View and add attachments that relate to this competitor.

Competitor Products

Competitor products appear in a list on the left. To display a quick summary on the right of the screen, choose a product. To open the competitor product details screen, choose *View Details*.

From the details screen, you can select the following tabs for a competitor product:

Tab	Actions
Details	View product details such as price, competitor and equivalent product.
Attachments	View attachments that relate to this competitor product.

Add a competitor product from any view by choosing the *Quick Create* tool.

Products

Products appear in a list on the left. To display a quick summary on the right of the screen, choose a product. To open the product details screen, choose *View Details*.

From the details screen, you can select the following tabs for a product:

Tab	Actions
Details	View product details such as code, category and unit of measure.
Overview	Get a summary of important information such as latest updates, quantity conversion and price list entries associated with this product.
Feed	Read any feed updates that are associated with this product. You can also comment on feed updates here.
Attachments	View attachments that relate to this product.
Sales	See sales for this product.

You cannot create a product on your iPad.

My Tickets

Tickets appear in a list on the left. To display a quick summary on the right of the screen, choose a ticket. To open the product details screen, choose *View Details*.

From the details screen, you can select the following tabs for a ticket:

Tab	Actions
Details	View ticket details such as message description, customer, and product information.
Feed	Read any feed updates that are associated with this ticket. You can also comment on feed updates here.
Interactions	View the history of a ticket including notes made by agents and comments made by customers taken from e-mail and social media Web sites.
Attachments	View attachments that are associated with this contact.

The following table lists tasks that you can perform on tickets in *View Details*:

Ticket Tasks

Task	Procedure	Result
Change the status of a ticket.	1. Select either Set Status. 2. Select a status from the from the selection list. You can only change the status of a ticket to *In Process* if the ticket is open. 3. Select Done.	The status of the ticket is updated. Tickets set to *Complete* will be visible in your list until you log back into the system.
Change the priority of a ticket.	1. Select Set Priority. 2. Select a priority from the from the selection list. 3. Select Done.	The priority of the ticket is changed.
Set a ticket as irrelevant.	1. Select Set As Irrelevant.	The ticket is set to the *Irrelevant* status and removed from your list. The ticket will be visible in your list until you log back into the system.
Escalate a ticket.	1. Click Escalate.	The ticket is set to *Escalated* status. Escalated tickets are re-assigned according to your system settings. The ticket will be visible in your list until you log back into the system.
Assign a ticket to another agent.	1. Click Assign To. 2. Select an agent from the list. 3. Select Done.	The ticket is moved either to you or the specified agent or team. The ticket will be visible in your list until you log back into the system.
Change the product.	1. Click Set Product. 2. Select product from the list. 3. Select a serial id from the list. 4. Select Done.	

Creating New Tickets

You can create tickets from the iPad, if this feature has been enabled by your administrator.

1. Select *New Item*.
2. Select *New Ticket*.
3. Enter all necessary information.
4. Select Done.

Library

The Library shows documents uploaded to your system. documents appear in a list on the left. To display a quick summary on the right of the screen, choose a document. To open the document details screen, choose *Details*.

From the details screen, you can select the following tabs for a document:

Tab	Actions
Details	View document details such as creator, date changed and version.
Overview	Get a summary of document information: latest updates and versions.

Tab	Actions
Feed	Read any feed updates that are associated with this document. You can also comment on feed updates here.
Versions	View version history for this document.

Update a document from the details screen by choosing the *Actions* button at the top right of the screen, then select *Replace*.

Partners

In the *Partners* view, you can display partner summaries, detail views, add partners and edit partner data.

From the partner details screen, you can select from the following tabs for a partner:

Tab	Actions
Details	View details such as partner name, status, and contact information.
Overview	Get a summary of important information such as latest updates, partner contacts, and addresses.
Feed	Read any feed updates that are associated with this partner. You can also comment on feed updates here.
Relationships	View defined interactions between this partner and other entities, for example other accounts, or contacts.
Addresses	View, or add addresses that are associated with this partner. You can also set the main address for the partner.
Partner Contacts	Add contacts to, or remove contacts from, this partner. You can also designate a contact as the main contact for the partner.
Sales Leads	View sales leads that involve this partner.
Opportunities	View sales opportunities involving this partner.
Attachments	View or add attachments for this partner.

Partner Contacts

Quickly view partner contact records from all, or active partner accounts and add new partner contacts.

Analysis

Working With Reports

Worksheets provide you with an area on which you can analyze data in reports in more detail, filter data, enhance reports with notes and annotations, resize, and send reports via e-mail. You can add and arrange one or more reports on a worksheet. You can also use the paperclip as a clipboard to which you can drag reports for later use.

Functions:

- Adding Reports
  To view reports that can be added to a worksheet, choose the *Add Report* icon. For more information about a relevant report, see the Analytics document in the SAP Cloud for Customer Help, and select the relevant application area.
- To refresh the data in the report, choose the *Refresh* icon.
- Options:

Options icon	Allows you to change views and variables or to switch to other chart types.
Info icon	Displays information about the report, such as report description, name of the selected view, selected variables, and so on.
Calendar icon	Allows you to change the time interval for which data in the report is displayed. Note that this function is only available if the selected report has a variable that supports time intervals.

- You can arrange a report on a worksheet by dragging the report to the desired location.
- By using the pinch and spread gesture, you can change the size of the report.
- You can flip between a table and chart view of a report by selecting the *Table* icon and the *Chart* icon respectively.
- You can scroll the display details of a report using two fingers.
- Changing Display Details
  If you have a report with a large amount of data, you can change the display details, that is, the data records that are displayed.
  To change the display details, select the report. The report is then highlighted. You can scroll to view different display details. Note that in the chart view, you can also scroll the legend and the captions.
  In the table view, to change column width, tap the column header to select the column and use the *Column Width* icon at the top right corner of the column.
  In the chart view, you can change the display details by using the pinch and spread gesture.

Filtering Data

The following options are available for filtering data:

- Filtering Report Data
  1. To display filtered data as a table or chart, select the report. The report is then highlighted.
  2. Select the data in the row in the table or the segments items in the chart. You can select multiple rows or segments by tapping
  3. Tap and hold until the table icon appears.
  4. Drag the selection to an area in the worksheet. The filtered data is then displayed.
- Filtering Using Criteria from Another Report
  If you have two reports, you can filter using criteria from one report.
  1. Open both reports on a worksheet.
  2. Select one or more lines in a table or one or more segments in a chart, as described above, to the other report.

  For example, you have two reports: Top 25 Suppliers and Purchase Order Tracking.
  To filter data by a supplier, drag a supplier from Top 25 Suppliers to the Purchase Order Tracking report.
- Displaying Data in Columns as Pie Chart
  To display filtered data as a pie chart, select a column in the table and drag it to an empty area on the worksheet. For example, for the Project Costs – Line Items report, you can display the Amount in Company Currency by Business Document Type as a pie chart.

Annotations and Notes

To add annotations and notes, select the *Add Notes* icon. You can also send reports using e-mail and add a voice note to the e-mail.

Organizing Worksheets

You can create new worksheets by swiping the current worksheet. To organize your worksheets, select the My Worksheets button. All of your worksheets appear. You can manage your worksheets or stack of worksheets by long

tapping the screen or by tapping the Edit button. You can then change the order of the worksheets and stacks, create stacks, rename or delete worksheets and stacks.

- Stacks
  You can collect worksheets into stacks by tapping a worksheet and dragging it to another one. This is useful, for example, if you want to collect worksheets by topic.
  You can expand or collapse a stack using spread or pinch accordingly.
- Name/Rename
  To name or rename a worksheet or stack, tap the name. A keyboard appears on which you can enter a new name or change the existing one.
- Delete
  To delete worksheets or stacks, long tap a worksheet. You delete the worksheet or stack by taping the *Delete* icon.

Compare Versions of Reports on Worksheets

To compare versions, you must ensure that you have enabled the Store Data option. For more information about storing data, see the Security section.

When you compare versions, you compare one version of a report, such as the current version, with a version containing historical data that is stored on your device. The versions available to compare are the version that you have used previously.

Using the *Compare* icon, you can compare two versions of reports on worksheets.

A timeline at the bottom of the screen appears. You can zoom the timeline in and out and return to today's date. In the timeline, versions of the report are available chronologically.

In the timeline, sheets appear to indicate the availability of a version of the report.

Multiple lines and sheets within a given time interval indicate that multiple versions of the report are available.

In the comparison area, the selected version of the worksheet is highlighted, and you can choose a version to drop to the left of the selected version or drop on sheet. You can also drop a version to the right of the selected report and the selected report is moved to the left.

Note that if after you have dropped a version of a report to the comparison area, and the report is grayed out, there is no data to compare with the other version.

If there are multiple reports on the worksheet, you can double tap one to focus.

By tapping *Highlight Changes*, changes to the data are highlighted, making it easier for you to analyze your reports. You can define the significance of the deviation in the changes to the data by using the slider at the bottom of the screen.

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7.15.4 SAP Cloud for Customer for iPhone

With this SAP Cloud for Customer mobile solution, you can access the main functions of the system that have been tailored to business on-the-run. These include managing accounts, contacts, and activities; forwarding tasks; and viewing personalized reports. Changes made on your iPhone are automatically updated in the system over the Internet, online and in real time.

Information For Administrators

In the *Application and User Management* work center, ensure that for each mobile work center view to be accessed on a mobile device, the user of the mobile device is assigned the related desktop work center view.

Eleven default reports have been designated for mobile use in the standard system: *Lead by Status*, *Sales Effectiveness Scorecard*, *Lead Conversion Rate*, *Opportunity Pipeline Analysis*, *Sales Reps by Revenue Won*, *Sales Reps by Revenue in Pipeline*, *Average Sales Cycle*, *Pipeline Analysis for next 12 Months*, *Pipeline Health Scorecard*, *Pipeline Funnel* and *Sales Summary (Current Year)*. In addition you can create additional reports and add them to the mobile work center. See the Help Center for more information on customizing reports.

You, as an administrator, can add an existing extension field to a mobile view. For further information, see Add an Extension Field to a Mobile Floorplan.

Installing The Application

Install the SAP Cloud for Customer application for iPhone from the iTunes Store.

Start the application on your device then proceed as follows:

1. Choose *Options*.
2. Enter the *URL* to your system.
3. Set a *Credential Timeout*, which is the amount of time your user and password are saved on your iPhone for the next log on. Due to security issues, you should ensure that this timeout meets your company's security guidelines. The default is *Always*, which resets the user ID and password on log out.
4. Return to the logon screen to enter your user and password, and choose *Log On*.

If you do not have the information required for these settings or you have continued problems logging on to the application, contact your system administrator for assistance.

SAP does not warrant that the software and/or features as described herein will be available without interruption or permanently. SAP draws your attention to the fact that the availability is subject to the sole discretion of the operator of the app store. The operator of the app store may, at any time and without notice, restrict, interrupt, or prevent use of the software, or delete the software from your mobile device, or require SAP to do any of the foregoing actions.

Getting Support

To get support for technical errors, follow this standard support process. First, activate logging in the *Support* section of the *Settings* screen, then reproduce the problem. The application automatically creates, saves, and attaches the log to an e-mail, and proposes an e-mail address if you have set one as default. Choose *Send Support Information* to complete and send this e-mail to your local administrator, who can then try to assist you before contacting SAP

Support. Ensure that you deactivate logging when you are done, as the logging function may impair performance on your iPhone.

Views and further tasks

Searching And Navigating

When you call up an overview, the system automatically lists your documents or other records in alphabetical or chronological order. In many cases, you can switch to a list of all available documents or other records.

You can filter any list by entering a search term manually. The application supports a wild card search with asterisks (*).

Data will usually be refreshed as you navigate from one screen to the next. However, in some situations you may have to manually refresh the displayed data using the application's pull down refresh function. For example, you may have to use the refresh function to view the very latest feed updates.

Most views include filter buttons above the results list. These buttons let you display, for example items belonging to you, or to your team.

Note that multitasking is not always supported. To carry out some tasks, for example making a phone call from the account overview, you must exit the application. To return, you will have to log on again.

For more information, refer to the iPhone documentation.

Feed

Use the filters on the Feed overview to select the feed updates you wish to view: All, System, People, or Private. To create a new feed update, tap + . Tap an update to view details. From the details view you can comment on the update and open mentioned items.

> You cannot mention people or items, send private updates, or tag feed updates created on your iPhone.

Accounts

You can display, edit and create accounts.

In the Accounts view, a colored indicator next to an account shows the status of the account in the system: a green light indicates that the account is active; a red light indicates that the account is blocked. A grey or unlit indicator means the account is obsolete. A red indicator does not stop you from processing the account on your iPhone. To create a new account in the accounts list, tap +.

In the overview, account address information and communication details are displayed on the *General* tab. Tap the pin icon next to the address to display it in Google Maps. You can also:

- Call a customer by choosing the telephone number
- Send an e-mail by choosing the e-mail address
- Open the account website by choosing the hyperlink
- Create a follow-up activity, or edit the account information by tapping the actions button in the top right corner.

On the *Contacts* and *Activities* tabs, you can search for, display, and edit contacts or activities for the account. Select the contact or activity to open an overview. Here you can access contact information and communication details, as well as activities related to this specific contact, or to the account in general.

Tap *ERP Docs* to view sales quote or sales order documents generated by your SAP ERP system. Note: this tab does not contain any data unless your system has been configured to integrate sales documents from your SAP ERP system.

Opportunities and Leads

You can display, edit and create opportunities and leads.

In the *Opportunities* and *Leads* views, you can access worklists of opportunities and leads.

Select one to check the details, change data, or create related follow-up activities and documents.

Tap *Edit* to accept or decline a lead that has been assigned to you, create an opportunity from a lead, change the chance of success, or status, of an opportunity, or follow feed updates for a lead or opportunity.

For opportunities, you can tap *ERP Docs* to view sales quote or sales order documents generated by your SAP ERP system. Note: this tab does not contain any data unless your system has been configured to integrate sales documents from your SAP ERP system.

Contacts

You can display, edit and create contacts.

Contact address information, communication details, and activities are displayed in the overview. To change a contact's general data tap the actions button in the top right corner, then tap *Edit* or to create a new contact, tap + and enter the contact's name, address, communication and other details.

If you create a new contact for an existing account, you can search for and select the account ID of the account in the *Account/Partner* field.

Activities

You can display, edit and create activities.

To change an activity, in the overview, tap the actions button in the top right corner, then tap *Edit*. You can also create a new activity in the *Activities* list by tapping + and selecting the relevant activity type. The system proposes values for many of the fields, for example: organizer, dates and times, category and priority. You can manually change these values, and search for and select other values, such as an account and contacts for the activity.

Today's Appointments

In the *Today's Appointments* view, you can review and edit your appointments for the current day. You can also add new appointments here.

Reports

Select a report to open the report and display it in graph form.

Tap the sprocket icon to review and activate your default or personalized views on the report, select a variant, to sort the report by date, activate and deactivate the filter, and sort the report values in ascending or descending order.

To zoom in the graph, double tap on the graph. There are two zoom levels. On the top level, you can scroll right or left in the graph. On the bottom level, you can scroll up and down on the values and key figures.

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7.15.5 SAP Customer Insight for iPad

SAP Customer Insight makes you smarter with breaking news and sales information for your accounts that matter most. You view this information as an engaging digital magazine providing real-time customer information in an interactive format.

Installing The Application

Install SAP Customer Insight for iPad from the iTunes Store. Launch the application, and select the sprocket icon on the log on screen to open the Settings window and do the following:

- Enter the *URL* for your backend system.
- Set an *App Password Time-Out*, which is the period of inactivity before automatic log off. Due to security issues, you should ensure that this time-out meets your company's security guidelines. The default is five minutes.
- SAP recommends that you enable the Passcode Lock on your iPad when using SAP Customer Insight (In the iPad *Settings* app, *General* section).

Choose *Apply* to return to the logon screen, enter your user and password, and choose *Logon*.

If you do not have the information required for these settings or you have problems logging on, contact your system administrator.

> SAP does not warrant that the software and/or features as described herein will be available without interruption or permanently. SAP draws your attention to the fact that the availability is subject to the sole discretion of the operator of the app store. The operator of the app store may, at any time and without notice, restrict, interrupt, or prevent use of the software, or delete the software from your mobile device, or require SAP to do any of the foregoing actions.

Getting Support

To get support for technical errors, use the following standard support process:

1. Open the Settings window by selecting the sprocket icon on the log on screen.
2. Activate logging in the *Support* section of the *Settings* window.
3. Reproduce the problem. The application automatically creates, saves, and attaches the log to an e-mail, and proposes an e-mail address if you have set one as default.
4. Return to the Settings screen, and choose *Send Log* to complete and send this e-mail to your local administrator, who can then try to assist you before contacting SAP support.
5. Deactivate logging when you are done, as the logging function may impair performance on your iPad.

Frequently Asked Questions

What determines the contents of the news area?

The news stories you see are related to the accounts in your activities list. This provides up to date information about accounts you will be dealing with in the near future.

I want to rearrange the items on the home screen.

Tap and hold a tile, then drag and drop just like app icons on the iOS home screens.

Can I change the information that appears on the home screen?

Tap the icon at the top right corner of the screen and select *Personalization*. This opens a list of available reports that you can add to the home screen. Tap the "plus" icon to add a report, tap "minus" to remove a report. You can also remove a tile from the home screen by tapping and holding, then tap the close icon at the upper left of the tile.

In addition to the default reports, your administrator can create custom reports for your organization.

How do I change the appearance of a tile on the home screen?

Double tap a tile to choose from the tile types available for that report. If a report can use only one tile type, the double tap does nothing.

Can I resize the tiles?

Reports represented by a chart tile can be stretched to occupy the space of two tiles, either horizontally or vertically. Use a pinch gesture to resize a chart tile.

When I open the Win Ratio report, why do I also see in process and open opportunities?

When the report first opens it shows all opportunities for the current quarter. To view won or lost opportunities for a specific month, tap a bar in the chart.

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See Also

Start Here for SAP Cloud for Sales

7.15.6 VIDEO: SAP Customer Insight for iPad

Video

SAP Customer Insight for iPad (4m 11s)

Find out how to work with tiles, view report details, and personalize your dashboard with SAP Customer Insight.

7.15.7 VIDEO: Navigation and Feed for iPad

Video

Navigation and Feed for iPad (4m 38s)

Find out how to use the feed, navigate to different views, and use the toolbars in SAP Cloud for Customer for iPad.

7.15.8 VIDEO: Creating Items on iPad

Video

Creating Items on iPad (4m 46s)

Find out how to create and edit items on SAP Cloud for Customer for iPad, including how to convert a lead to an opportunity.

7.15.9 VIDEO: Working with iPad Offline Mode

Video

Working with iPad Offline Mode (3m 58s)

Find out how to use SAP Cloud for Customer for iPad in Offline Mode.

8 Service Features

8.1 VIDEO: Start Here for Service

Video

Start Here for Service (8m 08s)

Find out how to use SAP Cloud for Service.

8.2 Customer Service

8.2.1 Queue

In the *Queue*, you can read messages posted by customers on social media Web sites in tickets. You can use the tools in the *Queue* to process customer tickets.

Tasks

Ticket Tasks

You must first select a ticket to work on it. You can select multiple tickets by holding down the `Ctrl` key.

The following table lists tasks that you can perform on any ticket:

Ticket Tasks

Task	Procedure	Result
Change the status of a ticket.	1. Click the *Activities* icon. 2. Select *Set Status...* 3. Select the appropriate status from the dropdown list..	The status of the ticket is updated.
Change the priority of a ticket.	1. Click the *Activities* icon. 2. Select *Set Priority....* 3. Select the appropriate priority from the dropdown list.	The priority icon changes according to your selection.

Task	Procedure	Result
Set a ticket as irrelevant.	1. Click the *Activities* icon. 2. Select *Set As Irrelevant*. 3. Click Yes in the *Confirm Ticket Relevance* window.	The ticket is set to the *Set As Irrelevant* status and removed from all queues.
Escalate a ticket to a supervisor or subject matter expert.	1. Click the *Activities* icon. 2. Select *Escalate*. 3. Click Yes in the *Confirm Escalation* window.	The ticket is set to *Escalated* status. Escalated tickets may be assigned to a supervisor or designee depending on your system settings.
De-escalate a ticket.	1. Click the *Activities* icon. 2. Select *De-escalate*. 3. Click Yes in the *Confirm De-escalation* window.	
Assign a ticket to yourself, another agent, or another team.	1. Click the *Activities* icon. a. Select *Me* to assign the ticket to yourself. b. Select *Agent...* to assign the ticket to another agent. c. Select *Team...* to assign the ticket to another team. 2. To assign the ticket to another agent or team, do one or the following: a. Enter the name of the agent or team. b. Search for an agent or team by clicking the value help icon. Select the agent or team from the options presented. 3. Click OK.	The ticket is moved either to you or the specified agent or team.
Add a note to a ticket.	1. Click the *Activities* icon. 2. Select *Add Note*. 3. Enter your note. 4. Enable *Visible to Customer* if you want the note to be visible on your customer portal. 5. click Save.	

See Also

About Worklists [page 58]

8.2.2 Tickets

In the *Tickets*, you can read messages posted by customers on social media Web sites in tickets. You can use the tools in the *Tickets* to process customer tickets.

Tasks

Common Ticket Tasks

You must first select a ticket to work on it. You can select multiple tickets by holding down either the `Shift` key or the `Ctrl` key.

The following table lists tasks that you can perform on any ticket:

Ticket Tasks

Task	Procedure	Result
Change the status of a ticket.	1. Click the *Activities* icon. 2. Select *Set Status...* 3. Select the appropriate status from the dropdown list..	The status of the ticket is updated.
Change the priority of a ticket.	1. Click the *Activities* icon. 2. Select *Set Priority...*. 3. Select the appropriate priority from the dropdown list.	The priority icon changes according to your selection.
Set a ticket as irrelevant.	1. Click the *Activities* icon. 2. Select *Set As Irrelevant*. 3. Click Yes in the *Confirm Ticket Relevance* window.	The ticket is set to the *Set As Irrelevant* status and removed from all queues.
Escalate a ticket to a supervisor or subject matter expert.	1. Click the *Activities* icon. 2. Select *Escalate*. 3. Click Yes in the *Confirm Escalation* window.	The ticket is set to *Escalated* status. Escalated tickets may be assigned to a supervisor or designee depending on your system settings.
De-escalate a ticket.	1. Click the *Activities* icon. 2. Select *De-escalate*. 3. Click Yes in the *Confirm De-escalation* window.	

Task	Procedure	Result
Assign a ticket to yourself, another agent, or another team.	1. Click the *Activities* icon. a. Select *Me* to assign the ticket to yourself. b. Select *Agent...* to assign the ticket to another agent. c. Select *Team...* to assign the ticket to another team. 2. To assign the ticket to another agent or team, do one or the following: a. Enter the name of the agent or team. b. Search for an agent or team by clicking the value help icon. Select the agent or team from the options presented. 3. Click OK.	The ticket is moved either to you or the specified agent or team.
Add a note to a ticket.	1. Click the *Activities* icon. 2. Select *Add Note*. 3. Enter your note. 4. Enable *Visible to Customer* if you want the note to be visible on your customer portal. 5. click Save.	

See Also

About Worklists [page 58]

8.2.3 Work Orders

A work order is another time span in the lifecycle of a ticket after a service agent decided that a service technician is needed to solve the issue. After the ticket is released as work order the service technician can open the order in the *Work Orders* work center to review and refine the planned work. After work was performed the service technician can confirm the actual work done.

Business Background

Prerequisite

Your administrator has enabled work orders in your solution.

Tasks

Prepare Your Work Orders

1. After a ticket is processed and the service agent forwards the ticket to you by setting the status *Released as Work Order* you find it in the *Work Orders* work center.
2. To review and enhance the work order, open it and check the information, for example, categorization, time lines, and incident description.
3. On the *Services & Parts* tab you find the added items and you can adapt this list as required.
4. Do the same on the *Tasks* and *Survey* tab. Note that you only can add surveys that are set up for work orders. For more information, see Surveys [page 88].
5. Check the *Involved Parties* tab.

Fix the Issue and Confirm Your Work Orders

1. After the work order preparation is done you can start with your work and complete the items that are listed under *Services & Parts*, *Tasks*, and *Survey*.
2. On the *Services & Parts* tab set the work progress of the items you are working on to *Started* using Actions > Start Work. You can now enter the actual start and end data in the table and also add notes if required.
3. With Actions > Finish Work you state that you finished this item. With Actions > Not Relevant you can state that the item was not required.
4. Beside the confirmed services and parts, you can also provide an overall work description and categorize the cause and the resolution.
5. After you fixed the issue and completed all items of the work order set the status to *Completed* and save the work order.

8.2.4 Processing Tickets in the Workspace

The workspace provides you with tools to solve customer problems. You access the workspace when you open a ticket. You can search through similar tickets and knowledge base articles to find solutions. You can also respond to customers in social media channels.

Tasks

Common Ticket Tasks

The following table lists tasks that you can perform on tickets:

Ticket Tasks

Task	Procedure	Result
Change the status of a ticket.	1. Click the editable field next to *Status*. 2. Select the new status from the drop down. 3. Save your changes.	The status of the ticket is updated.
Change the priority of a ticket.	1. Click the dropdown next to *Priority*. 2. Select a priority from the dropdown.	The priority icon changes according to your selection.
Set a ticket as irrelevant.	1. Click Set As Irrelevant. 2. Click Yes in the *Confirm Ticket Relevance* window.	The ticket is set to the *Irrelevant* status and removed from all queues.
Escalate a ticket to a supervisor or subject matter expert.	1. Click Escalate. 2. Click Yes in the *Confirm Escalation* window.	The ticket is set to *Escalated* status. Escalated tickets may be assigned to a supervisor or designee depending on your system settings.
Assign a ticket to yourself, another agent, or another team.	1. Click Assign To. a. Select *Me* to assign the ticket to yourself. b. Select *Agent...* to assign the ticket to another agent. c. Select *Team...* to assign the ticket to another team. 2. To assign the ticket to another agent or team, do one or the following: a. Enter the name of the agent or team. b. Search for an agent or team by clicking the value help icon. Select the agent or team from the options presented. 3. Click Ok.	The ticket is moved either to you or the specified agent or team.

Task	Procedure	Result
Copy a ticket to an On Premise CRM System.	If your solution is connected to an On Premise CRM solution, you can copy the ticket to the On Premise solution by performing the following: 1. Click Copy to CRM.	A copy of the ticket is now available in the external system. You can still see the ticket in your solution but it can only be edited in the external system. You can see an id number assigned to the ticket in the *External ID* field in the workspace. This number cannot be changed. The external system will update the ticket status in your solution. An agent has copied a ticket to an On Premise CRM system. The agent checks the ticket periodically to make sure the ticket is completed. When the ticket is set to *Completed* in the external system, the agent can now see that the status of the ticket is set to *Completed* in the workspace.
Create follow up items for a ticket.	You can create tickets and sales quotes to create follow up tasks so you can complete a ticket. 1. Click Follow Up. 2. Select either *Create Ticket* or *Create Sales Quote*. 3. Enter all necessary information and save your changes. You can view the follow-up items created for the ticket in *Document Flow*. Follow-up items are indicated by an arrow that points away from the ticket you are working on.	
Copy ticket information into a new ticket.	You can copy ticket information from an existing ticket into a new ticket, for example, to make a ticket for a customer that is having a similar issue. 1. Click Copy. 2. Some of original ticket information will be copied from the ticket you are working on. 3. Enter all necessary additional information and save your changes.	

You won't see tickets leave your queue until you exit the workspace.

Responding to a Ticket

Responses that contain profanity are blocked from being sent by the solution. If your message contains profanity, the solution will ask you to remove it.

> Responses to Twitter channels are limited 140 characters, including spaces. If you enter a message greater than 140 characters, you will not be able to send the response. The solution counts the remaining available characters as you type.

Sending a Public Response to Twitter

To send a public message, proceed as follows:

1. Enter your message in the text box by doing one of the following:
   a. Typing your own message
   b. Clicking *Template* then selecting the message you want to send
2. Attach any articles that may help your customer.
3. Click Tweet.
   Your response will be added to the ticket activities. The message will be sent to Twitter as a reply to the original Tweet received from customer.

Sending a Private Message Using Twitter

> To use Twitter to send a private message, the user must follow the twitter handle of the company used in the response.

You can send a private message directly to customers in Twitter that will not be publicly viewed. To send a private message, proceed as follows:

1. Click *Twitter*.
2. Enter your message in the text box by doing one of the following:
   a. Typing your own message
   b. Clicking *Template* then selecting the message you want to send
3. Attach any articles that may help your customer.
4. Click Send Private Message.
   Your response will be added to the message activities.

Sending a Response to Facebook

Customers can send either public messages by commenting on your company's Facebook wall or private messages by messaging your company using Facebook. Your response will automatically be public if the customer's message was public or private if the customer's message was private. To respond to Facebook messages, proceed as follows:

1. Enter your message in the text box by doing one of the following:
   a. Typing your own message
   b. Clicking *Template* then selecting the message you want to send
2. Attach any articles that may help your customer.
3. Click Comment.
   Your response will be added to the ticket activities. The message will be sent to Facebook as a reply comment to the customer's original Facebook message.

Responding to a Facebook Comment

You can reply to comments to a post in Facebook, if your solution is set up to allow this feature and if your company's Facebook page allows nested commenting. To reply to a Facebook comment, perform the following steps:

1. Click *Reply to Comment*.
2. Enter your response.
3. Click Comment.

Your response will appear underneath the original both comment in your solution and in Facebook.

Responding to an E-Mail

To respond to a customer via e-mail, your system must have the customer's e-mail address stored. For more information about editing a customer's profile to add an e-mail address, see About Individual Customers [page 205].

You can respond to a customer using e-mail by performing the following:

1. Click *E-Mail*.
2. Enter your message in the text box by doing one of the following:
   a. Typing your own message
   b. Clicking *Template* then selecting the message you want to send
3. Attach any articles or files that may help your customer.
4. Click Send .
   Your e-mail will be added to the ticket activities.

If the e-mail bounces, you will receive an error message in *Interactions*. The error message will be generated after the solution tries to deliver the message.

Responding to a Custom Channel

If your company has enabled a custom channel, you can respond by performing the following:

1. Click the name of the custom channel.
2. Enter your message in the text box by doing one of the following:
   a. Typing your own message
   b. Clicking *Template* then selecting the message you want to send
3. Attach any articles that may help your customer.
4. Click Post .
   Your response will be added to the ticket activities.

Responding to a Web Portal

Responses that contain profanity are blocked from being sent by the solution. If your message contains profanity, the solution will ask you to remove it.

If your company has enabled a Web portal, you can add a note to the portal by performing the following:

1. Select *Portal*.
2. Manually enter your message in the text box or choose a pre-written response by selecting *Template*.
3. Click Post .
   Your response will be added to the ticket activities.

Responding with a Chat URL

If your company has enabled a chat feature, you can respond to a customer with a chat URL. The chat URL will allow your customer to chat in real-time with an agent in your organization, as defined by the rules created by your administrator.

To send a chat URL to your customer, perform the following:

1. Enter the message you would like to send to your customer.
2. Click *Chat URL* at the bottom of the textbox.
   A URL will appear in the textbox.
3. Send the message to your customer.

You or another agent will be able to chat with a customer in the software of the chat provider. Depending on the configuration of your system, the chat transcript may be available to you in the ticket interactions.

Searching for Knowledge Base Articles

1. Enter your search terms in the *Search* input field in the *Solution Finder*. Press `Enter` or click the *Search* icon to initiate the search.
   The solution will return a list of articles based on your search keywords.
2. Open the article in a detail view either by clicking the hyperlink at the top of an article or by hovering over the article then clicking the *Open* icon.
3. You can send your customers a link to the document by clicking Attach. If browsing in your knowledge base is enabled, you can link to any article you find in the knowledge base by opening the article in the *Article Details* overlay and then clicking Attach.
   A URL will be entered into the text box in the interactions area.
4. Click *Reset* to clear your search terms.
   The original list of recommended solutions will populate the tab.

Searching for Similar Tickets

1. Enter your search terms in the *Search* input field in *Similar Tickets*. Press `Enter` or click the *Search* icon to initiate the search.
   The solution will return a list of in process and completed tickets based on your search keywords.
2. There are two ways to see the articles attached to a ticket:
   a. Click the link next to the paperclip icon in the list view.
   b. Open the ticket in detail view by clicking the ticket number and then opening the *Attached Articles* tab.
      The ticket detail allows you to see both the ticket history and the articles attached to the ticket.
3. You can send customers a link to an article by clicking Attach.
   a. Click *Attach to Article* if you accessed the article from the link in the list view.
   b. Click the attach (+) button if you accessed the article from the *Attached Articles* tab in the detail view.

   A URL will be entered into the text box in the ticket activities area.
4. Click *Reset* to clear your search terms.
   The original list of recommended solutions will populate the tab and the keywords associated with the ticket will populate the search textbox.

Creating a Note

1. Click *Add Note*.
2. Enter your note in the text box.
3. Click Save.
   The note will be added to the ticket interactions.

Changing Product Information

1. In *Additional Information* card click the *Edit* icon.
2. Perform one of the following:
   a. Type in the product name, then choose `Enter`.
   b. Click *Value Selection* to choose the product name from the list in the *Select a Product* window.
      You can perform a search in the *Select a Product* window. For more information, see About Worklists [page 58].

You can also register the product directly from the workspace by clicking the *Edit* icon for *Serial Number*, then click the *Value Selection* icon. On the resulting pop-up, click *New Registration*.

For more information, see Registered Products [page 178].

Changing a Customer

1. In *Customer*, click the *Edit* icon.
2. Do one of the following:
   1. Click *Value Selection* to choose the customer name from the list in the window.
      You can perform a search in the window. For more information, see About Worklists [page 58].
   2. Type in the customer name then press `Enter` .
3. Click Save.

Adding an Attachment

1. Click *Attachments*.
2. Click *Add*. Select the source of the attachment.
   The *Add Attachment* window opens.
3. Click Browse and find the file you want to attach.
4. Select either *Standard Attachment* or *Internal Attachment* from the *Document Type* selection field.

   > *Internal Attachments* can be viewed by all users of the solution but not to customers.

5. Click *Add*.

Retweeting a Message

You can retweet a message that has been posted by a customer to Twitter. Hover your mouse over the message in *Interactions* and click the *Retweet* icon. The message will be posted on your company's Twitter page.

Reviewing the Ticket Change History

In order to review the change history, you need to switch on the tab using the *Personalize* > *This Screen* feature.

1. Under *Sections*, choose *Tabs*.
2. Under *Tabs*, select *Change History*.
3. Save your entries and close the personalize pane.
   The *Change History* tab is now active in the workspace.

Changing the Category Information

You can change the category information for the *Incident Category*, *Object Category*, *Resolution Category*, *Cause Category*, and *Service Category*.

1. Click *Edit* next to the category.
2. Click the *Value Selection* icon then select the new category ID.
   a. For incident categories you can pick the new category form the *Tree View*.

Changing a Message Sentiment

If text analysis incorrectly interprets a message sentiment, you can manually change the sentiment of the message in *Interactions*.

1. Click the sentiment name in *Interactions*.

2. Select the new sentiment from the dropdown list.

Viewing Ticket Relationships in Document Flow

The *Document Flow* tab displays the tickets and sales orders that are related to a ticket you are working on. When you create a follow up ticket or sales order, *Document Flow* displays the relationship between the items. Arrows point away from the original ticket and point toward any follow up tickets and sales orders.

Tracking Ticket Progress with Timeline Information

The data points in *Timeline* help you track a ticket's progress. Some of the dates in the *Timeline* are pre-populated when you open a ticket. These dates are calculated based on your company's service level agreements and the time at which the ticket was created.

Some of the fields in *Timeline* will change when you change a ticket value or respond to a customer. The table below describes the events that cause changes to fields in the *Timeline*.

Field Name	What Causes the Value to Change
Changed On	• Changing information in a ticket. You change the product associated with the ticket. After you click Save, the time you see in *Changed On* is updated. • Responding to a customer. • Making a note to the ticket.
Initial Review Completed	Changing the ticket status from *Open* to *In Process*.
Last Customer Interaction	Each time a customer responds to an agent, the time the response occurred will populate this field.
Last Agent Interaction	Each time an agent responds to a customer, the time the response occurred will populate this field.
Next Response Due	Each time a customer responds to an agent, the time populated in *Next Response Due* will be updated according to your company's service level agreement, if this has been configured for you solution by your administrator.
Date Completed	Changing the ticket status to *Completed*.

8.2.5 VIDEO: Processing Tickets

Video

Processing Tickets (4m 12s)

Find out about the tools in the Workspace and in the Queue and Tickets list that help you to complete tickets.

8.2.6 Templates

You can use templates to save time and to standardize responses. Templates are available directly from the workspace and can include placeholders for business data like the customer name or the ticket ID.

You'll find templates under *Customer Service* > *Templates*.

Tasks

Creating an E-Mail Template

E-mail templates are created and edited directly in the system using a rich text editor and can use placeholders that are automatically replaced with the related business data once the response is sent.

1. Click *New*.
2. Enter the template name.
   You can also enter a template description, for example to describe when to use the template.
3. Select *E-Mail* as the template's channel type.
4. Enter the e-mail *Subject* line.
5. Enter the e-mail *Template Text*.
6. Save your entries.

   > If you want to use placeholders in your template, you can either *Save And Open* or go back and edit the template later.

Creating a Social Channel Template

Templates for social media channels use plain text and can include placeholders.

1. Click *New*.
2. Enter the template name.
   You can also enter a template description, for example to describe when to use the template.
3. Select *Social* as the template's channel type.
4. Then select the *Social Channel*.
5. Enter the *Template Text*.

   > Messages for Twitter cannot contain more than 140 characters, including spaces. As you type, the system displays a running character count below the text box.

6. Save your entries.

   > If you want to use placeholders in your template, you can either *Save And Open* or go back and edit the template later.

Creating a Portal Template

Templates for the service portal use plain text and can include placeholders.

1. Click *New*.
2. Enter the template name.
   You can also enter a template description, for example to describe when to use the template.
3. Enter the *Template Text*.
4. Save your entries.

   > If you want to use placeholders in your template, you can either *Save And Open* or go back and edit the template later.

Creating a Template from a Response in the Workspace

Once a response has been sent to a customer, you can save it as a template.

1. Find the response you want to save as a template in the interactions area of the workspace.
2. Click *Save Response As Template*.
   The *New Template* quick create opens with the channel type and other relevant fields automatically filled to reflect the response you chose.
3. Enter a name for the template and, if necessary, add additional information.
4. Save your entries.

Creating a Corporate Template

If you have administrator access rights in the system, then you have the option of creating corporate templates.

When creating a new template, for any channel type, select *Corporate* to make the template available for use by all agents.

Adding Placeholders to a Text-Based Template

You can add placeholders for business data in your templates. When a response is sent using a template with placeholders, the system will replace the placeholder with the actual business data it represents.

1. Open the template details by clicking the template name.
2. Click inside the *Template Text* box.
3. Edit the text and add any of the placeholders from the list below.
4. Save your changes.

Available Template Placeholders

Placeholder	Description
`#AgentName#`	Replaced by the name of the agent assigned to the ticket
`#AccountName#`	Replaced by the name of the account associated with the ticket
`#Status#`	Replaced with the status of the ticket
`#Description#`	Replaced with the description of the ticket
`#TicketID#`	Replaced with the ID of the ticket
`#ContactName#`	Replaced with the name of the contact associated with the ticket
`#ProductID#`	Replaced with the ID of the product associated with the ticket
`#CreationDateTime#`	Replaced with the date and time when the ticket was created in the system
`#ProductDescription#`	Replaced with the description of the product associated with the ticket
`#ProductSerialNumber#`	Replaced with the serial number of the registered product associated with the ticket
`#WarrantyID#`	Replaced with the ID of the warranty assigned to the ticket
`#WarrantyEndDate#`	Replaced with the expiration date of the warranty assigned to the ticket
`#InitialResponseDueDateTime#`	Replaced with the date and time by which the initial response to a ticket should be sent
`#CompletionDueDateTime#`	Replaced with the date and time by which the ticket should be completed

8.2.7 Unassociated E-Mails

If your system is configured to support e-mail as a channel for creating customer service tickets, then any incoming e-mails that the system cannot automatically convert to a new ticket or assign to an existing ticket get added to the list of unassociated e-mails. These e-mails must be manually processed by agents.

There are several reasons why an e-mail could not be automatically associated with a ticket. For example, your system may be configured to require manual processing or there may be more than one contact with the same sender e-mail address. The system displays the reason in the e-mail details to assist you determining whether the e-mail should be converted to a new ticket or assigned to an existing ticket.

Processing Unassociated E-Mails

1. To view the list of unassociated e-mails in your system, go to *Customer Service* > *Unassociated E-Mails*.
2. Open the *E-Mail* details.
3. Review the reason why the system did not automatically associate the e-mail with a ticket.
   You'll find the reason just above the *General* section of the e-mail details.
4. Determine whether the e-mail should be converted to a new ticket or assigned to an existing one.

   > For example, the reason indicates there were no matching contacts found for the e-mail address used to send the e-mail. But the e-mail message itself mentions a corporate customer account and includes a full contact name. You look up the account and find the contact mentioned in the e-mail. Since the e-mail message does not mention an open issue or known ticket, you determine that this e-mail should be converted to a new ticket for that customer.

5. Under Action, choose one of the following:
   - *Convert to New Ticket*
     The *New Ticket* quick create opens where you can complete the required information and save your entries to create a new ticket based on the e-mail.
     The e-mail is removed from the list of unassociated e-mails and can no longer be processed as an e-mail.
   - *Assign to Existing Ticket*
     A selection dialog box opens where you can choose a ticket to which to assign the e-mail.
     The e-mail is removed from the list of unassociated e-mails and can no longer be processed as an e-mail.
   - *Delete*
     Deletes the e-mail.
6. Close the e-mail details.

8.3 Customers

8.3.1 Accounts

On the *Accounts* tab, you can display existing accounts, create new accounts, and set account statuses. You can also display account details, review additional data, and rename and edit accounts, as required, and, if you are authorized to do so, assign employees to an account team.

Once you have created an account, it can no longer be deleted. You can, however, set its status as *Obsolete*.

Tasks

Creating Accounts

1. Choose *Customers* > *Accounts*.
2. Choose *New*.
3. Enter the *Name* and *Country* of the account, then specify its *City*.
   If desired, you also may enter the account's Web site, or specify its classification.
4. Save your entries.

   If your administrator has configured the solution to check for potential duplicate accounts, then select Check for Duplicates, before you save the account, to ensure that its information is unique.
   If the information you enter is found to resemble the information of an existing account, then the solution notifies you that potential duplicate accounts were found.

   For a description of the available save options, see Save Options.

You may designate only one primary contact per account. Secondary contacts cannot be specified.

If Territory Management has been activated, then an employee who is not defined to be a territory owner cannot be defined as the owner of an account.

Editing Accounts

You can edit accounts from the *Account* item header, as follows:

1. Position the cursor over the information to be edited. For example, if you want to rename the account, position the cursor over the *Name* field.
   As you move the cursor over an editable field, the background changes to a different color. When you click a field, you enter edit mode.
2. Change the desired entries.
   Depending on the field, use the drop-down menu or automatic search to choose an entry.
3. Save your entries.
   For a description of the available save options, see Save Options.

From the item header, you can only edit the current main address of an account.

To edit an address other than the current main address, or to designate a different address as the main address, choose the *Addresses* tab.

Choosing Account Filters

Accounts are displayed in one of three standard filters, described below:

Standard Account Filters

Filter	Accounts Displayed
All	All accounts for which no owner or account team is defined, plus all accounts that you are authorized to access.
My Accounts	All accounts for which you are assigned as a member of the account team.
My Team's Accounts	All accounts for which you are assigned as a member of the account team, and, if you are a sales manager, all accounts for which any subordinate of yours is assigned as a member of the account team.

The standard filters above do not include obsolete accounts. To view obsolete accounts, create and save a new filter. For more information, see Working with Lists [page 55].

The default filter is *My Accounts*. You can modify the range of accounts displayed by selecting among these filters.

Setting Account Status

From the account details, use the *Actions* menu to choose the following applicable status:

- Choose *Actions* > *Set as Active* to change the account status to Active.
- Choose *Actions* > *Block* to change the account status to Blocked, which will exclude the account from subsequent search results. By blocking an account, you also prevent future opportunities, activities and other items from being assigned to it.
- Choose *Actions* > *Set as Obsolete* to change the account status to Obsolete. By setting an account as obsolete, you also prevent future opportunities, activities and other items from being assigned to it.

You may assign a new status to an account at any time, as required. For example, you can set any active account as obsolete, or any blocked account as active.

Using Map View

If your administrator has configured the solution accordingly, then you can display accounts in *Map View*, if desired. Choose *Map View* to see, in an integrated third-party mapping service, the location of each account address — both individually, and in relation to one another. Within *Map View*, you can also zoom in, zoom out, and pan in any direction.

Reviewing Tabs in Account Details

The tabs that you see in the account details depend upon the features of SAP Cloud for Customer that your company has implemented.

Some of the tabs below are not visible by default. Assuming the features are enabled by your administrator, you must personalize the screen to make some tabs visible. For more information, watch the video Customizing Your Personal Settings .

From the account details, you can select these tabs to perform additional actions. The following table summarizes, per feature, the tabs that are available:

Tab	Actions	Available in SAP Cloud for Sales	Available in SAP Cloud for Service and SAP Cloud for Social Engagement
Overview	Select this tab to see the latest updates made to the account, the contacts designated to the account, and any addresses associated with the account.	X	X
Feed	Select this tab to read, open, tag, flag or comment feed updates that are associated with this account. For more information, see About the Feed [page 25].	X	X
Recent Orders	Select this tab to view recent orders that are associated with this account. If your administrator has not set up the 360 overview, then this tab will not appear.	X	X
Charts	• On this tab, under *Average Sales Cycle*, you can view the average sales cycle, in number of days, for this account and for all accounts. Data for each average sales cycle is represented separately, but both sets of data are represented in relation to the quarterly sales cycle. You may also export this data to Microsoft Excel®, if desired. For more information, see About Analysis [page 119]. • On this tab, under *Revenue Trend*, you can view the overall revenue trend for this account in relation to the quarterly sales cycle. You may also export this data to Microsoft Excel, if desired.	X	
Activities	Select this tab to view, edit or create appointments, tasks, phone calls, or e-mails that are associated with this account.	X	X
Account Team	Select this tab to add employees to, or remove employees from, the team responsible for this account. On this tab, if you possess the appropriate authorizations, you can also modify the role of employees who are assigned to this account. If territory management is active, then the sales territory team also appears in this tab.	X	X
Sales Territories	Select this tab to view associated sales territories. If your administrator has not configured the solution to make sales territories visible, then this tab will not appear.	X	
Relationships	Select this tab to view associated relationships. If your administrator has not enabled integration with SAP ERP, then this tab will not appear.	X	X

Addresses	Select this tab to view, edit or add addresses that are associated with this account. For any account, only one address can be specified as the main address. To indicate that an address may be used for shipping or billing, select *Yes* in the corresponding column. If more than one shipping or billing address is specified, select *Yes (standard)* in the appropriate column to designate an address as the default shipping or billing address. It is not possible to remove an existing address from an account, because the existing address may already be referenced by other items, such as leads and opportunities.	X	X
Contacts	Select this tab to add contacts to, or remove contacts from, this account. On this tab, you can also designate a contact as the *Primary Contact* for the account.	X	X
Account Hierarchy	Select this tab to view the displayed accounts in a hierarchical structure, provided that a parent account has been specified for the accounts at hand. You can expand and collapse the account hierarchy at any level to display as many or as few accounts as you like. If your administrator has not configured the solution to make account hierarchies visible, then this tab will not appear. Alternatively, if your administrator has activated the generic hierarchy structure and added accounts to it, then you can instead choose *Business Partners* > *Account Hierarchies* to view sales account hierarchies, provided that the administrator has assigned the corresponding work center and work center view to your business user.	X	X
Campaigns	Select this tab to view associated campaigns.	X	
Sales Leads	Select this tab to view or create sales leads that relate to this account.	X	
Opportunities	Select this tab to view or create opportunities that relate to this account.	X	
Attachments	Select this tab to view, edit or add attachments that relate to this account.	X	X
SAVO	Select this tab to view SAVO documents. If your administrator has not completed integration with SAVO, then this tab will not appear	X	
Sales Data	Select this tab to view associated sales data. If your administrator has not enabled integration with SAP ERP, then this tab will not appear.	X	
Sales Documents	Select this tab to view associated sales documents.	X	
Tickets	Select this tab to view associated tickets.		X
Target Groups	Select this tab to view associated target groups.	X	

Groups	Select this tab to view information that derives from SAP Jam, and to perform the following actions: • create internal groups in SAP Jam to collaborate on account team meetings, prepare for customer visits, and so on • create external or cross-company groups in SAP Jam to safeguard accounts, upsell products, and so on • automatically invite account team members and contacts to the group in SAP Jam, with the flexibility to add or remove e-mail addresses • view a list of groups in SAP Jam that are associated with the given account, and navigate from this list to SAP Jam • navigate from SAP Jam back to the account • view a list of recommended groups in SAP Jam for the given account, and navigate from this list to SAP Jam • view the latest SAP Jam Feed updates for the associated groups If your administrator has not enabled integration with SAP Jam, then this tab will not appear.	X	
Registered Products	Select this tab to view associated registered products.		X
Visits	Select this tab to view associated visits, and to set the recommended visit frequency for this account.	X	
Product Lists	Select this tab to view associated product lists.	X	X

Assigning Employees to an Account Team

1. Choose *Customers* > *Accounts*.
2. Open the appropriate account.
3. Select the *Account Team* tab.
4. Open the *Employees* pane or the *Shelf*.
5. Drag the appropriate employees from the *Employees* pane or the *Shelf* and drop them onto the *Account Team* tab.

Removing Employees from an Account Team

1. Choose *Customers* > *Accounts*.
2. Open the appropriate account.
3. Select the *Account Team* tab.
4. Find the employee to be removed.
5. Choose *Remove*.

See Also

Contacts [page 80]

Start Here for SAP Cloud for Sales

8.3.2 Contacts

Contacts are organized in relation to the accounts from which they originate. For more information, see Accounts [page 75].

On the *Contacts* tab, you can display existing contacts associated with accounts, create new contacts, and set contact statuses. You can also display contact details, review additional data, and rename and edit contacts, as required.

> Once you have created a contact, it can no longer be deleted. You can, however, set its status as *Obsolete*.

Tasks

Creating Contacts

1. Choose *Customers* > *Contacts*.
2. Choose *New*.
3. Enter the *First Name* and *Last Name* of the contact, then specify the *Account* that is associated with it.
   If desired, enter additional details for the contact, such as organizational information, or the *Phone*, *Mobile*, and *E-Mail* of the contact.
4. Save your entries.

   > If your administrator has scoped the solution to check for potential duplicate contacts, then select Check for Duplicates, before you save the contact, to ensure that its information is unique.
   > If the information you enter is found to resemble the information of an existing contact, then the solution notifies you that potential duplicate contacts were found.

   For a description of the available save options, see Save Options.

Editing Contacts

You can edit contacts from the *Contact* item header, as follows:

1. Position the cursor over the information to be edited. For example, if you want to rename the contact, position the cursor over the *Name* field.
   As you move the cursor over an editable field, the background changes to a different color. When you click a field, you enter edit mode.
2. Change the desired entries.
   Depending on the field, use the drop-down menu or automatic search to choose an entry.
3. Save your entries.
   For a description of the available save options, see Save Options.

> From the item header, you cannot edit the business address of the account that is associated with this contact, but you can use the drop-down menu to specify a different business address for this contact, if desired.
>
> To create or edit personal addresses for the contact, choose the *Addresses* tab.

Choosing Contact Filters

Contacts are displayed in one of three standard filters, described below:

Standard Contact Filters

Filter	Contacts Displayed
All	All contacts of all accounts that you are authorized to access.
My Contacts	All contacts of all accounts for which you are assigned as a member of the account team.
My Team's Contacts	All contacts of all accounts for which you are assigned as a member of the account team, and, if you are a sales manager, all contacts of all accounts for which any subordinate of yours is assigned as a member of the account team.

The standard filters above do not include obsolete accounts. To view obsolete contacts, create and save a new filter. For more information, see Working with Lists [page 55].

The default filter is *My Contacts*, You can modify the range of accounts displayed by selecting among these filters.

Setting Contact Status

From the contact details, use the *Actions* menu to choose the following applicable status:

- Choose *Actions* > *Set as Active* to change the contact status to **Active**.
- Choose *Actions* > *Block* to change the contact status to **Blocked**, which will exclude the contact from subsequent search results.
- Choose *Actions* > *Set as Obsolete* to change the contact status to **Obsolete**.

You may assign a new status to a contact at any time, as required. For example, you can set any active contact as obsolete, or any blocked contact as active.

Reviewing Tabs in Contact Details

The tabs that you see in the contact details depend upon the features of SAP Cloud for Customer that your company has implemented.

Some of the tabs below are not visible by default. Assuming the features are enabled by your administrator, you must personalize the screen to make some tabs visible. For more information, watch the video Customizing Your Personal Settings .

From the contact details, you can select these tabs to perform additional actions. The following table summarizes, per feature, the tabs that are available:

Tab	Actions	Available in SAP Cloud for Sales	Available in SAP Cloud for Service and SAP Cloud for Social Engagement
Overview	Select this tab to see the latest updates made to the contact, and any addresses associated with the contact.	X	X

Feed	Select this tab to read any Feed updates that are associated with this contact. For more information, see About the Feed [page 25]. On this tab, you can also open, tag or flag Feed updates, mark them as favorites, or comment them. For more information, see Tags [page 31] and Shelf [page 30].	X	X
Addresses	Select this tab to view, edit or add addresses that are associated with this contact. It is not possible to remove an existing address from a contact, because the existing address may already be referenced by other items, such as leads and opportunities.	X	X
Activities	Select this tab to view, edit or create activities that are associated with this contact — including appointments, tasks, phone calls, and e-mails. For more information, see About Activities [page 36].	X	X
Sales Leads	Select this tab to view leads that relate to this contact. For more information, see Sales Leads [page 82].	X	X
Opportunities	Select this tab to view potential sales opportunities for this contact. For more information, see Opportunities [page 84].	X	X
Relationships	Select this tab to view associated relationships. If your administrator has not enabled integration with SAP ERP, then this tab will not appear.	X	X
Registered Products	Select *Registered Products* to view registered products associated with this contact.		X
Campaigns	Select this tab to view associated campaigns.	X	
Marketing Interactions	Select this tab to view associated marketing interactions.	X	
Tickets	Select this tab to view tickets associated with this contact.		X

See Also

Accounts [page 75]

8.4 Registered Products

A registered product is one that is associated with a specific customer and for which you have recorded a unique serial number. When a ticket is created, the registered product information allows the agent to identify the unique customer product, the current valid warranty, and to determine service entitlements if any exist. Additional information, such as product location or sales channel, is used in the service process and for reporting purposes.

Tasks

Registering a Product

You register products using the *New Registered Product* tool which can be accessed from the following locations in the solution:

- From the toolbar, click *New Registered Product*.
- Under *Products* › *Registered Products*, click New.
- From the customer detail screen on the *Registered Products* tab, click New.
  When you create a registered product from a customer detail screen, the relevant information is automatically copied into the form.
- From the workspace, under *Additional Information* click the *Edit* icon for *Serial ID*, then click the *Value Selection* icon. On the resulting pop-up, click *New Registration*.
  When you create a registered product from the workspace, the customer and product information in the ticket are automatically copied into the form.

1. Enter the data for *Customer*, *Product* and *Serial ID* for identifying the registered product.

   The registered product ID is made up of the registered product and reference product, and is a unique ID. However, the registered product is not necessarily unique. For example you can have a registered product 127 for the reference product A, and a registered product 127 for the reference product B. For this reason, the system may remind you that the number already exists if you should enter a non-unique registered product.

2. Save your entries.

Editing a Registered Product

You can review or add more information to a registered product from the registered product details screen. And similar to creating a registered product, you can access that details screen from several locations in the solution. Primarily, from one of the following:

- When creating the new registered product, rather than just saving and closing the form, you can choose instead to *Save and Open*.
- From the customer details *Registered Products* tab, click the *Serial ID* link.
- Under *Products* › *Registered Products*, select your query and then click the *Serial ID* of the registered product you want to review or edit.

Adding Product Details

The *Overview* tab is where you can enter additional details such as the product location, the owner of the registered product (if different from the customer), and notes.

Remember to save your changes before closing the registered product details.

Adding a Warranty

1. To add a warranty for the registered product, on the *Overview* tab, click the *Edit* icon for *Warranty*, then click the *Value Selection* icon and select a warranty from the list.
2. Save your entries.
   For more information, see Warranties [page 180].

Adding Attachments

1. On the *Attachments* tab, click *Add*.
2. Select the type of attachment to add.
   - *Local File*: allows you to choose a file from your local drive and upload it to the system
   - *Web Link*: allows you to define a URL and a display title
   - *From Library*: allows you to choose an attachment from the solution library
     For more information, see Library [page 64].

3. Save your entries.

Reviewing or Adding Tickets

You can review any existing tickets related to the registered product on the *Tickets* tab. You can also create a new ticket.

1. Click *New*.
2. Review the automatically filled information and make any necessary changes.
3. Enter a subject and description for the ticket.
4. Save your entries.
   If you choose to *Save and Open*, the new ticket will open for processing in the workspace.

Review Changes

You can review the change history for the registered product on the *Changes* tab.

8.5 Warranties

You can create warranties in the system, defining their duration and any uncovered incident categories. These warranties are then available to assign to registered products.

Tasks

Create a Warranty

1. Go to *Products* > *Warranties* and click *New*.
2. Enter a name, the ID, and the duration.
   Enter the duration as a number and time unit, for example “30 days” or “30 d”, and the system will recognize this and convert it to “30 Day(s)”.
3. Under *Uncovered Incident Categories* you can add process or incident categories from your service category catalog.
   Tickets assigned an uncovered incident category are excluded from warranty coverage.

   > Service or process categories without assigned incident categories are not relevant for the warranty coverage. In column *Category Type* you can see whether you selected a process or an incident category.

4. Save your entries.
   The warranty is created in status *In Preparation*.

Activate the Warranty

To activate the warranty search for the corresponding warranty and select *Actions* > *Activate*.

Assigning a Warranty to a Registered Product

1. Go to *Products* > *Registered Products*.
2. Find the relevant registered product and open the details by clicking the serial ID.
3. For *Warranty*, click *Edit*.
4. Click *Value Selection* and select the relevant warranty.

5. Save your entries.

Uncovered Incident Categories

Under *Uncovered Incident Categories* you can assign incident categories to exclude specific issues from the warranty in case it is selected in, for example, a ticket. To make it easier you can also add service categories. In this case all incident categories underneath the selected service category are uncovered for this warranty. The same applies incident categories below another incident category.

Only the incident categories have an impact whether a warranty should be granted for a product or not. For example, if no incident category was assigned to a service category listed in *Uncovered Incident Categories* and if you then select this service category in the ticket, no warranty limitation and/or exclusion will take place.

Categories are bundled hierarchically so the higher level also includes the lower levels: *Catalog* (hidden field by default in the *Uncovered Incident Categories*) includes a selection of service categories.

A **service category** is used to categorize different kinds of service inquiries, for example, a product problem or an information request.

The **incident categories**, and all related incident categories in a lower level, are subcategories of the service categories and are used to categorize the different types of incidents. The following is an example for the service category product problem: gas boiler or electrical boilers.

- Customer Service & Support (Catalog)
  - Information Request (Service Category)
  - Product Problem (Service Category)
    - Gas Boiler (Incident Category)
      - Control Regulation Unit (Incident Category)
        - Customer Fault (Incident Category)
        - Installation Problem (Incident Category)
    - Electrical Boiler (Incident Category)
      - Control Regulation Unit (Incident Category)
        - Customer Fault (Incident Category)
        - Installation Problem (Incident Category)

A company is selling boilers. All gas boilers should have a 5–year warranty. Excluded from the warranty should be the customer fault category. The administrator creates a warranty that is valid for 5 years and selects under *Uncovered Incident Categories* the service category *Customer Fault (Incident Category)* and *Electrical Boiler*.

In the case where a customer has a problem with a gas boiler and the issue was, for example, the customer's fault, the warranty of the customer does not cover this damage. But if the damage is due to an installation problem, the damage is covered by the warranty because it was not excluded.

8.6 Analysis

Analysis is your access point to system analytical data and reports that you can use to recognize trends, measure customer sentiment, or track metrics like ticket volume or ticket completion rates.

You can also download reports and run ad-hoc analyses, either in your Web browser or in Microsoft Excel®.

Service Overview Dashboard

The *Service Overview* is a set of charts based on the reports in your system. They provide you with a snapshot of the information you find most important and can be rearranged to suit the way you work.

For more information on adding or removing reports from the overview to personalize it, see Personalizing Dashboards [page 122].

To view report details, click the *Actions* icon and choose one of the following options:

- *View with Web Browser*
  For more information, see here [page 229].
- *View with Web Browser — Quick Filter*
  For more information, see here [page 232].
- *View with Microsoft Excel®*
  For more information, see here [page 234].

Reports for the Customer Service and Social Media Features of SAP Cloud for Customer

The following reports are available from SAP, though your administrator may create custom reports that you can also choose to display in the overview dashboard (listed in alphabetical order):

Reports in SAP Cloud for Service and SAP Cloud for Social Engagement

Report	Description
Customer Count	Shows the number of customers by channel, product, and time.
Customer Sentiment Measure	Shows a customer's average sentiment over time.
Daily Average Service Request Backlog	Shows the number of daily average service requests for month-to-date and year-to-date.
Daily Average Service Request Backlog (Priority)	Shows the number of daily average service requests by priority.
Daily Average Service Request Backlog (Service Organization)	Shows the number of daily average service requests by structure, service organization, and service and support organization.
Daily Average Service Request Backlog (Top-10 Service Category)	Shows the number of daily average service requests by the top 10 service categories.
Daily Average Service Request Backlog (Year)	Shows the number of daily average service requests by year.
Operational Metrics	Shows the average handle time by agent, channel, product, and time.
Sentiment Measure	Shows the number of positive, neutral, and negative sentiments by channel, product, and time.
Service Request Backlog	Shows the number of open and in process service request backlog items per rolling week.
Service Request Completion Rate	Shows the service request completion rate by day.
Service Request Daily Average	Shows the number of service request daily average for month-to-date and year-to-date.
Ticket Activity Volume	Shows the total number of inbound ticket activities, including original messages, comments, and likes by channel and product.
Ticket Completion Rate	Shows the percentage of tickets completed by channel, product, agent, and time.

Report	Description
Ticket Escalation Rate	Shows the percentage of tickets escalated by channel, product, agent, and time.
Ticket Priority	Shows the average and median ticket priority scores and the number of high, medium, and low priority tickets by channel, product, and time.
Ticket Volume	Shows the number of tickets by channel, product, status, and time.
Top 5 Influencers	Shows the top 5 influencers or customers based on the Klout score or message volume by channel and product.
Top 5 Knowledge Base Articles	Shows the top 5 knowledge base articles shared with customers by channel, product, and time.
Top 5 Topics	Shows the top 5 topics identified in tickets by channel, product, and time.

8.7 Processing Inbound Phone Calls

Overview

Upon installing the Computer Telephony Integration (CTI) client adapter provided by SAP, your solution will automatically generate phone activities that capture customer information for incoming calls, provided that your solution is enabled to contain the *Live Activity* pane.

Prerequisites

You must have third-party telephony software installed.

Tasks

Installing the CTI Client Adapter for Telephony Integration

To allow your solution to automatically generate phone activities, install the CTI client adapter as follows:

1. In SAP Cloud for Customer, choose *Downloads*.
2. Download the *CTI Client Adapter* as follows:
    1. Hover over *CTI Client Adapter*, then click Download.
    2. Click Run when prompted.
    3. Click Yes when asked if you want the solution to publish changes on your computer.
    4. Complete the steps in the setup wizard.
    Upon completing the installation steps, the adapter will be installed on your computer, and a shortcut will be visible on your desktop.
3. Right-click the shortcut to the adapter on your desktop. Open the *Compatibility* menu. Enable the selection *Run the program as an administrator*.

Adding Notes to Current Phone Call Activity

If you solution is enabled to contain the *Live Activity* pane, then you can view the details of your current phone call and add notes to the activity.

> To see current phone call details, the *CTI Client Adapter* installed on your desktop must be running. You need to run the adapter before you open *SAP Cloud for Customer*.

1. During a phone call, click *Live Activity*.
   The details of your current call will be populated in the pane:
   - *Call Information* contains details about the current call.
   - *Customers* contains detailed information about the customer on the call. You can also search for customer information.
   - *Tickets* contains a list of tickets related to the current customer. You can also search for tickets.
2. Enter your comments in *Notes* and save your changes.
   To see the notes you added to the activity, choose *Activities* › *Phone Calls*, then open the phone call activity.
   Your comments are visible in *Notes*.

Converting a Phone Activity to a Ticket

You can convert a phone activity to a ticket if your solution is scoped to use Social and Service features.

1. Choose *Activities* › *Phone Calls*.
2. Select the phone activity you want to convert from the list.
3. Select *Actions* and then *Convert to New Ticket*.
   You will see a ticket in the *Queue* that contains the information from the phone activity.

9 Social Media Features

9.1 VIDEO: Start Here for Social Engagement

Video

Start Here for Social Engagement (7m 22s)

Find out the basic information you need to get working on tickets in SAP Cloud for Social Engagement.

9.2 Customer Service

9.2.1 Queue

In the *Queue*, you can read messages posted by customers on social media Web sites in tickets. You can use the tools in the *Queue* to process customer tickets.

Tasks

Ticket Tasks

You must first select a ticket to work on it. You can select multiple tickets by holding down the `Ctrl` key.

The following table lists tasks that you can perform on any ticket:

Ticket Tasks

Task	Procedure	Result
Change the status of a ticket.	1. Click the *Activities* icon. 2. Select *Set Status...* 3. Select the appropriate status from the dropdown list..	The status of the ticket is updated.
Change the priority of a ticket.	1. Click the *Activities* icon. 2. Select *Set Priority...*. 3. Select the appropriate priority from the dropdown list.	The priority icon changes according to your selection.

Task	Procedure	Result
Set a ticket as irrelevant.	1. Click the *Activities* icon. 2. Select *Set As Irrelevant*. 3. Click Yes in the *Confirm Ticket Relevance* window.	The ticket is set to the *Set As Irrelevant* status and removed from all queues.
Escalate a ticket to a supervisor or subject matter expert.	1. Click the *Activities* icon. 2. Select *Escalate*. 3. Click Yes in the *Confirm Escalation* window.	The ticket is set to *Escalated* status. Escalated tickets may be assigned to a supervisor or designee depending on your system settings.
De-escalate a ticket.	1. Click the *Activities* icon. 2. Select *De-escalate*. 3. Click Yes in the *Confirm De-escalation* window.	
Assign a ticket to yourself, another agent, or another team.	1. Click the *Activities* icon. a. Select *Me* to assign the ticket to yourself. b. Select *Agent...* to assign the ticket to another agent. c. Select *Team...* to assign the ticket to another team. 2. To assign the ticket to another agent or team, do one or the following: a. Enter the name of the agent or team. b. Search for an agent or team by clicking the value help icon. Select the agent or team from the options presented. 3. Click OK.	The ticket is moved either to you or the specified agent or team.
Add a note to a ticket.	1. Click the *Activities* icon. 2. Select *Add Note*. 3. Enter your note. 4. Enable *Visible to Customer* if you want the note to be visible on your customer portal. 5. click Save.	

See Also

About Worklists [page 58]

9.2.2 VIDEO: Processing Tickets

Video

Processing Tickets (4m 12s)

Find out about the tools in the Workspace and in the Queue and Tickets list that help you to complete tickets.

9.2.3 Processing Tickets in the Workspace

The workspace provides you with tools to solve customer problems. You access the workspace when you open a ticket. You can search through similar tickets and knowledge base articles to find solutions. You can also respond to customers in social media channels.

Tasks

Common Ticket Tasks

The following table lists tasks that you can perform on tickets:

Ticket Tasks

Task	Procedure	Result
Change the status of a ticket.	1. Click the editable field next to *Status*. 2. Select the new status from the drop down. 3. Save your changes.	The status of the ticket is updated.
Change the priority of a ticket.	1. Click the dropdown next to *Priority*. 2. Select a priority from the dropdown.	The priority icon changes according to your selection.
Set a ticket as irrelevant.	1. Click Set As Irrelevant. 2. Click Yes in the *Confirm Ticket Relevance* window.	The ticket is set to the *Irrelevant* status and removed from all queues.
Escalate a ticket to a supervisor or subject matter expert.	1. Click Escalate. 2. Click Yes in the *Confirm Escalation* window.	The ticket is set to *Escalated* status. Escalated tickets may be assigned to a supervisor or designee depending on your system settings.

Task	Procedure	Result
Assign a ticket to yourself, another agent, or another team.	1. Click Assign To. a. Select *Me* to assign the ticket to yourself. b. Select *Agent...* to assign the ticket to another agent. c. Select *Team...* to assign the ticket to another team. 2. To assign the ticket to another agent or team, do one or the following: a. Enter the name of the agent or team. b. Search for an agent or team by clicking the value help icon. Select the agent or team from the options presented. 3. Click Ok.	The ticket is moved either to you or the specified agent or team.
Copy a ticket to an On Premise CRM System.	If your solution is connected to an On Premise CRM solution, you can copy the ticket to the On Premise solution by performing the following: 1. Click Copy to CRM.	A copy of the ticket is now available in the external system. You can still see the ticket in your solution but it can only be edited in the external system. You can see an id number assigned to the ticket in the *External ID* field in the workspace. This number cannot be changed. The external system will update the ticket status in your solution. An agent has copied a ticket to an On Premise CRM system. The agent checks the ticket periodically to make sure the ticket is completed. When the ticket is set to *Completed* in the external system, the agent can now see that the status of the ticket is set to *Completed* in the workspace.
Create follow up items for a ticket.	You can create tickets and sales quotes to create follow up tasks so you can complete a ticket. 1. Click Follow Up. 2. Select either *Create Ticket* or *Create Sales Quote*. 3. Enter all necessary information and save your changes. You can view the follow-up items created for the ticket in *Document Flow*. Follow-up items are indicated by an arrow that points away from the ticket you are working on.	

Task	Procedure	Result
Copy ticket information into a new ticket.	You can copy ticket information from an existing ticket into a new ticket, for example, to make a ticket for a customer that is having a similar issue. 1. Click Copy. 2. Some of original ticket information will be copied from the ticket you are working on. 3. Enter all necessary additional information and save your changes.	

You won't see tickets leave your queue until you exit the workspace.

Responding to a Ticket

Responses that contain profanity are blocked from being sent by the solution. If your message contains profanity, the solution will ask you to remove it.

Responses to Twitter channels are limited 140 characters, including spaces. If you enter a message greater than 140 characters, you will not be able to send the response. The solution counts the remaining available characters as you type.

Sending a Public Response to Twitter

To send a public message, proceed as follows:

1. Enter your message in the text box by doing one of the following:
   a. Typing your own message
   b. Clicking *Template* then selecting the message you want to send
2. Attach any articles that may help your customer.
3. Click Tweet.
   Your response will be added to the ticket activities. The message will be sent to Twitter as a reply to the original Tweet received from customer.

Sending a Private Message Using Twitter

To use Twitter to send a private message, the user must follow the twitter handle of the company used in the response.

You can send a private message directly to customers in Twitter that will not be publicly viewed. To send a private message, proceed as follows:

1. Click *Twitter*.
2. Enter your message in the text box by doing one of the following:
   a. Typing your own message
   b. Clicking *Template* then selecting the message you want to send
3. Attach any articles that may help your customer.
4. Click Send Private Message.

Your response will be added to the message activities.

Sending a Response to Facebook

Customers can send either public messages by commenting on your company's Facebook wall or private messages by messaging your company using Facebook. Your response will automatically be public if the customer's message was public or private if the customer's message was private. To respond to Facebook messages, proceed as follows:

1. Enter your message in the text box by doing one of the following:
   a. Typing your own message
   b. Clicking *Template* then selecting the message you want to send
2. Attach any articles that may help your customer.
3. Click Comment.
   Your response will be added to the ticket activities. The message will be sent to Facebook as a reply comment to the customer's original Facebook message.

Responding to a Facebook Comment

You can reply to comments to a post in Facebook, if your solution is set up to allow this feature and if your company's Facebook page allows nested commenting. To reply to a Facebook comment, perform the following steps:

1. Click *Reply to Comment*.
2. Enter your response.
3. Click Comment.

Your response will appear underneath the original both comment in your solution and in Facebook.

Responding to an E-Mail

> To respond to a customer via e-mail, your system must have the customer's e-mail address stored. For more information about editing a customer's profile to add an e-mail address, see About Individual Customers [page 205].

You can respond to a customer using e-mail by performing the following:

1. Click *E-Mail*.
2. Enter your message in the text box by doing one of the following:
   a. Typing your own message
   b. Clicking *Template* then selecting the message you want to send
3. Attach any articles or files that may help your customer.
4. Click Send .
   Your e-mail will be added to the ticket activities.

> If the e-mail bounces, you will receive an error message in *Interactions*. The error message will be generated after the solution tries to deliver the message.

Responding to a Custom Channel

If your company has enabled a custom channel, you can respond by performing the following:

1. Click the name of the custom channel.
2. Enter your message in the text box by doing one of the following:
   a. Typing your own message
   b. Clicking *Template* then selecting the message you want to send
3. Attach any articles that may help your customer.

4. Click Post .
   Your response will be added to the ticket activities.

Responding to a Web Portal

> Responses that contain profanity are blocked from being sent by the solution. If your message contains profanity, the solution will ask you to remove it.

If your company has enabled a Web portal, you can add a note to the portal by performing the following:

1. Select *Portal*.
2. Manually enter your message in the text box or choose a pre-written response by selecting *Template*.
3. Click Post .
   Your response will be added to the ticket activities.

Responding with a Chat URL

If your company has enabled a chat feature, you can respond to a customer with a chat URL. The chat URL will allow your customer to chat in real-time with an agent in your organization, as defined by the rules created by your administrator.

To send a chat URL to your customer, perform the following:

1. Enter the message you would like to send to your customer.
2. Click *Chat URL* at the bottom of the textbox.
   A URL will appear in the textbox.
3. Send the message to your customer.
   You or another agent will be able to chat with a customer in the software of the chat provider. Depending on the configuration of your system, the chat transcript may be available to you in the ticket interactions.

Searching for Knowledge Base Articles

1. Enter your search terms in the *Search* input field in the *Solution Finder*. Press `Enter` or click the *Search* icon to initiate the search.
   The solution will return a list of articles based on your search keywords.
2. Open the article in a detail view either by clicking the hyperlink at the top of an article or by hovering over the article then clicking the *Open* icon.
3. You can send your customers a link to the document by clicking Attach . If browsing in your knowledge base is enabled, you can link to any article you find in the knowledge base by opening the article in the *Article Details* overlay and then clicking Attach .
   A URL will be entered into the text box in the interactions area.
4. Click *Reset* to clear your search terms.
   The original list of recommended solutions will populate the tab.

Searching for Similar Tickets

1. Enter your search terms in the *Search* input field in *Similar Tickets*. Press `Enter` or click the *Search* icon to initiate the search.
   The solution will return a list of in process and completed tickets based on your search keywords.
2. There are two ways to see the articles attached to a ticket:
   a. Click the link next to the paperclip icon in the list view.
   b. Open the ticket in detail view by clicking the ticket number and then opening the *Attached Articles* tab.
      The ticket detail allows you to see both the ticket history and the articles attached to the ticket.
3. You can send customers a link to an article by clicking Attach .

a. Click *Attach to Article* if you accessed the article from the link in the list view.

b. Click the attach (+) button if you accessed the article from the *Attached Articles* tab in the detail view.

A URL will be entered into the text box in the ticket activities area.

4. Click *Reset* to clear your search terms.
The original list of recommended solutions will populate the tab and the keywords associated with the ticket will populate the search textbox.

Creating a Note

1. Click *Add Note*.
2. Enter your note in the text box.
3. Click Save.
The note will be added to the ticket interactions.

Changing Product Information

1. In *Additional Information* card click the *Edit* icon.
2. Perform one of the following:
   a. Type in the product name, then choose `Enter`.
   b. Click *Value Selection* to choose the product name from the list in the *Select a Product* window.
   You can perform a search in the *Select a Product* window. For more information, see About Worklists [page 58].

You can also register the product directly from the workspace by clicking the *Edit* icon for *Serial Number*, then click the *Value Selection* icon. On the resulting pop-up, click *New Registration*.

For more information, see Registered Products [page 178].

Changing a Customer

1. In *Customer*, click the *Edit* icon.
2. Do one of the following:
   1. Click *Value Selection* to choose the customer name from the list in the window.
   You can perform a search in the window. For more information, see About Worklists [page 58].
   2. Type in the customer name then press `Enter`.
3. Click Save.

Adding an Attachment

1. Click *Attachments*.
2. Click *Add*. Select the source of the attachment.
The *Add Attachment* window opens.
3. Click Browse and find the file you want to attach.
4. Select either *Standard Attachment* or *Internal Attachment* from the *Document Type* selection field.

> *Internal Attachments* can be viewed by all users of the solution but not to customers.

5. Click *Add*.

Retweeting a Message

You can retweet a message that has been posted by a customer to Twitter. Hover your mouse over the message in *Interactions* and click the *Retweet* icon. The message will be posted on your company's Twitter page.

Reviewing the Ticket Change History

In order to review the change history, you need to switch on the tab using the *Personalize* ▸ *This Screen* feature.

1. Under *Sections*, choose *Tabs*.
2. Under *Tabs*, select *Change History*.
3. Save your entries and close the personalize pane.
   The *Change History* tab is now active in the workspace.

Changing the Category Information

You can change the category information for the *Incident Category*, *Object Category*, *Resolution Category*, *Cause Category*, and *Service Category*.

1. Click *Edit* next to the category.
2. Click the *Value Selection* icon then select the new category ID.
   a. For incident categories you can pick the new category form the *Tree View*.

Changing a Message Sentiment

If text analysis incorrectly interprets a message sentiment, you can manually change the sentiment of the message in *Interactions*.

1. Click the sentiment name in *Interactions*.
2. Select the new sentiment from the dropdown list.

Viewing Ticket Relationships in Document Flow

The *Document Flow* tab displays the tickets and sales orders that are related to a ticket you are working on. When you create a follow up ticket or sales order, *Document Flow* displays the relationship between the items. Arrows point away from the original ticket and point toward any follow up tickets and sales orders.

Tracking Ticket Progress with Timeline Information

The data points in *Timeline* help you track a ticket's progress. Some of the dates in the *Timeline* are pre-populated when you open a ticket. These dates are calculated based on your company's service level agreements and the time at which the ticket was created.

Some of the fields in *Timeline* will change when you change a ticket value or respond to a customer. The table below describes the events that cause changes to fields in the *Timeline*.

Field Name	What Causes the Value to Change
Changed On	• Changing information in a ticket. You change the product associated with the ticket. After you click Save, the time you see in *Changed On* is updated. • Responding to a customer. • Making a note to the ticket.

Initial Review Completed	Changing the ticket status from *Open* to *In Process*.
Last Customer Interaction	Each time a customer responds to an agent, the time the response occurred will populate this field.
Last Agent Interaction	Each time an agent responds to a customer, the time the response occurred will populate this field.
Next Response Due	Each time a customer responds to an agent, the time populated in *Next Response Due* will be updated according to your company's service level agreement, if this has been configured for you solution by your administrator.
Date Completed	Changing the ticket status to *Completed*.

9.2.4 Social Media Messages

Social Media Messages allows you to see a messages generated on social media Web sites and broadcasts that you have created. You can see all replies and comments to messages and broadcast as separate items in the social media messages list that can be sorted, filtered, and searched.

You can delete Facebook messages and Twitter responses in the social media messages list using the *Actions* icon.

Tasks

Sending Broadcast Messages

1. Click *New* .
2. Select the channel to receive the broadcast by either typing in the channel name in the channel field or clicking the *Select Channel* icon and selecting the channel from the resulting list.
   A broadcast can only be used for one channel.
   Picture attachments can be sent to Twitter channels.
3. Enter the broadcast message in the *Message* text box.

   Messages for Twitter cannot contain more than 140 characters, including spaces. As you type, the solution counts the number of characters you have used.

4. Click Send .

   Once a broadcast is sent, it cannot be edited.

See Also

About Worklists [page 58]

9.2.5 Templates

You can use templates to save time and to standardize responses. Templates are available directly from the workspace and can include placeholders for business data like the customer name or the ticket ID.

You'll find templates under *Customer Service* > *Templates*.

Tasks

Creating an E-Mail Template

E-mail templates are created and edited directly in the system using a rich text editor and can use placeholders that are automatically replaced with the related business data once the response is sent.

1. Click *New*.
2. Enter the template name.
   You can also enter a template description, for example to describe when to use the template.
3. Select *E-Mail* as the template's channel type.
4. Enter the e-mail *Subject* line.
5. Enter the e-mail *Template Text*.
6. Save your entries.

   > If you want to use placeholders in your template, you can either *Save And Open* or go back and edit the template later.

Creating a Social Channel Template

Templates for social media channels use plain text and can include placeholders.

1. Click *New*.
2. Enter the template name.
   You can also enter a template description, for example to describe when to use the template.
3. Select *Social* as the template's channel type.
4. Then select the *Social Channel*.
5. Enter the *Template Text*.

   > Messages for Twitter cannot contain more than 140 characters, including spaces. As you type, the system displays a running character count below the text box.

6. Save your entries.

   > If you want to use placeholders in your template, you can either *Save And Open* or go back and edit the template later.

Creating a Portal Template

Templates for the service portal use plain text and can include placeholders.

1. Click *New*.

2. Enter the template name.
   You can also enter a template description, for example to describe when to use the template.
3. Enter the *Template Text*.
4. Save your entries.

   If you want to use placeholders in your template, you can either *Save And Open* or go back and edit the template later.

Creating a Template from a Response in the Workspace

Once a response has been sent to a customer, you can save it as a template.

1. Find the response you want to save as a template in the interactions area of the workspace.
2. Click *Save Response As Template*.
   The *New Template* quick create opens with the channel type and other relevant fields automatically filled to reflect the response you chose.
3. Enter a name for the template and, if necessary, add additional information.
4. Save your entries.

Creating a Corporate Template

If you have administrator access rights in the system, then you have the option of creating corporate templates.

When creating a new template, for any channel type, select *Corporate* to make the template available for use by all agents.

Adding Placeholders to a Text-Based Template

You can add placeholders for business data in your templates. When a response is sent using a template with placeholders, the system will replace the placeholder with the actual business data it represents.

1. Open the template details by clicking the template name.
2. Click inside the *Template Text* box.
3. Edit the text and add any of the placeholders from the list below.
4. Save your changes.

Available Template Placeholders

Placeholder	Description
`#AgentName#`	Replaced by the name of the agent assigned to the ticket
`#AccountName#`	Replaced by the name of the account associated with the ticket
`#Status#`	Replaced with the status of the ticket
`#Description#`	Replaced with the description of the ticket
`#TicketID#`	Replaced with the ID of the ticket
`#ContactName#`	Replaced with the name of the contact associated with the ticket
`#ProductID#`	Replaced with the ID of the product associated with the ticket
`#CreationDateTime#`	Replaced with the date and time when the ticket was created in the system
`#ProductDescription#`	Replaced with the description of the product associated with the ticket
`#ProductSerialNumber#`	Replaced with the serial number of the registered product associated with the ticket
`#WarrantyID#`	Replaced with the ID of the warranty assigned to the ticket

Placeholder	Description
`#WarrantyEndDate#`	Replaced with the expiration date of the warranty assigned to the ticket
`#InitialResponseDueDateTime#`	Replaced with the date and time by which the initial response to a ticket should be sent
`#CompletionDueDateTime#`	Replaced with the date and time by which the ticket should be completed

9.2.6 Unassociated E-Mails

If your system is configured to support e-mail as a channel for creating customer service tickets, then any incoming e-mails that the system cannot automatically convert to a new ticket or assign to an existing ticket get added to the list of unassociated e-mails. These e-mails must be manually processed by agents.

There are several reasons why an e-mail could not be automatically associated with a ticket. For example, your system may be configured to require manual processing or there may be more than one contact with the same sender e-mail address. The system displays the reason in the e-mail details to assist you determining whether the e-mail should be converted to a new ticket or assigned to an existing ticket.

Processing Unassociated E-Mails

1. To view the list of unassociated e-mails in your system, go to *Customer Service* > *Unassociated E-Mails*.
2. Open the *E-Mail* details.
3. Review the reason why the system did not automatically associate the e-mail with a ticket.
   You'll find the reason just above the *General* section of the e-mail details.
4. Determine whether the e-mail should be converted to a new ticket or assigned to an existing one.

   For example, the reason indicates there were no matching contacts found for the e-mail address used to send the e-mail. But the e-mail message itself mentions a corporate customer account and includes a full contact name. You look up the account and find the contact mentioned in the e-mail. Since the e-mail message does not mention an open issue or known ticket, you determine that this e-mail should be converted to a new ticket for that customer.
5. Under Action, choose one of the following:
   - *Convert to New Ticket*
     The *New Ticket* quick create opens where you can complete the required information and save your entries to create a new ticket based on the e-mail.
     The e-mail is removed from the list of unassociated e-mails and can no longer be processed as an e-mail.
   - *Assign to Existing Ticket*
     A selection dialog box opens where you can choose a ticket to which to assign the e-mail.
     The e-mail is removed from the list of unassociated e-mails and can no longer be processed as an e-mail.
   - *Delete*
     Deletes the e-mail.
6. Close the e-mail details.

9.3 Customers

9.3.1 Accounts

On the *Accounts* tab, you can display existing accounts, create new accounts, and set account statuses. You can also display account details, review additional data, and rename and edit accounts, as required, and, if you are authorized to do so, assign employees to an account team.

> Once you have created an account, it can no longer be deleted. You can, however, set its status as *Obsolete*.

Tasks

Creating Accounts

1. Choose *Customers* > *Accounts*.
2. Choose *New*.
3. Enter the *Name* and *Country* of the account, then specify its *City*.
   If desired, you also may enter the account's Web site, or specify its classification.
4. Save your entries.

   > If your administrator has configured the solution to check for potential duplicate accounts, then select Check for Duplicates, before you save the account, to ensure that its information is unique.
   > If the information you enter is found to resemble the information of an existing account, then the solution notifies you that potential duplicate accounts were found.

   For a description of the available save options, see Save Options.

> You may designate only one primary contact per account. Secondary contacts cannot be specified.
>
> If Territory Management has been activated, then an employee who is not defined to be a territory owner cannot be defined as the owner of an account.

Editing Accounts

You can edit accounts from the *Account* item header, as follows:

1. Position the cursor over the information to be edited. For example, if you want to rename the account, position the cursor over the *Name* field.
   As you move the cursor over an editable field, the background changes to a different color. When you click a field, you enter edit mode.
2. Change the desired entries.
   Depending on the field, use the drop-down menu or automatic search to choose an entry.
3. Save your entries.
   For a description of the available save options, see Save Options.

From the item header, you can only edit the current main address of an account.

To edit an address other than the current main address, or to designate a different address as the main address, choose the *Addresses* tab.

Choosing Account Filters

Accounts are displayed in one of three standard filters, described below:

Standard Account Filters

Filter	Accounts Displayed
All	All accounts for which no owner or account team is defined, plus all accounts that you are authorized to access.
My Accounts	All accounts for which you are assigned as a member of the account team.
My Team's Accounts	All accounts for which you are assigned as a member of the account team, and, if you are a sales manager, all accounts for which any subordinate of yours is assigned as a member of the account team.

The standard filters above do not include obsolete accounts. To view obsolete accounts, create and save a new filter. For more information, see Working with Lists [page 55].

The default filter is *My Accounts*. You can modify the range of accounts displayed by selecting among these filters.

Setting Account Status

From the account details, use the *Actions* menu to choose the following applicable status:

- Choose *Actions* > *Set as Active* to change the account status to Active.
- Choose *Actions* > *Block* to change the account status to Blocked, which will exclude the account from subsequent search results. By blocking an account, you also prevent future opportunities, activities and other items from being assigned to it.
- Choose *Actions* > *Set as Obsolete* to change the account status to Obsolete. By setting an account as obsolete, you also prevent future opportunities, activities and other items from being assigned to it.

You may assign a new status to an account at any time, as required. For example, you can set any active account as obsolete, or any blocked account as active.

Using Map View

If your administrator has configured the solution accordingly, then you can display accounts in *Map View*, if desired. Choose *Map View* to see, in an integrated third-party mapping service, the location of each account address — both individually, and in relation to one another. Within *Map View*, you can also zoom in, zoom out, and pan in any direction.

Reviewing Tabs in Account Details

The tabs that you see in the account details depend upon the features of SAP Cloud for Customer that your company has implemented.

Some of the tabs below are not visible by default. Assuming the features are enabled by your administrator, you must personalize the screen to make some tabs visible. For more information, watch the video Customizing Your Personal Settings .

From the account details, you can select these tabs to perform additional actions. The following table summarizes, per feature, the tabs that are available:

Tab	Actions	Available in SAP Cloud for Sales	Available in SAP Cloud for Service and SAP Cloud for Social Engagement
Overview	Select this tab to see the latest updates made to the account, the contacts designated to the account, and any addresses associated with the account.	X	X
Feed	Select this tab to read, open, tag, flag or comment feed updates that are associated with this account. For more information, see About the Feed [page 25].	X	X
Recent Orders	Select this tab to view recent orders that are associated with this account. If your administrator has not set up the 360 overview, then this tab will not appear.	X	X
Charts	• On this tab, under *Average Sales Cycle*, you can view the average sales cycle, in number of days, for this account and for all accounts. Data for each average sales cycle is represented separately, but both sets of data are represented in relation to the quarterly sales cycle. You may also export this data to Microsoft Excel®, if desired. For more information, see About Analysis [page 119]. • On this tab, under *Revenue Trend*, you can view the overall revenue trend for this account in relation to the quarterly sales cycle. You may also export this data to Microsoft Excel, if desired.	X	
Activities	Select this tab to view, edit or create appointments, tasks, phone calls, or e-mails that are associated with this account.	X	X
Account Team	Select this tab to add employees to, or remove employees from, the team responsible for this account. On this tab, if you possess the appropriate authorizations, you can also modify the role of employees who are assigned to this account. If territory management is active, then the sales territory team also appears in this tab.	X	X
Sales Territories	Select this tab to view associated sales territories. If your administrator has not configured the solution to make sales territories visible, then this tab will not appear.	X	
Relationships	Select this tab to view associated relationships. If your administrator has not enabled integration with SAP ERP, then this tab will not appear.	X	X

Addresses	Select this tab to view, edit or add addresses that are associated with this account. For any account, only one address can be specified as the main address. To indicate that an address may be used for shipping or billing, select *Yes* in the corresponding column. If more than one shipping or billing address is specified, select *Yes (standard)* in the appropriate column to designate an address as the default shipping or billing address. It is not possible to remove an existing address from an account, because the existing address may already be referenced by other items, such as leads and opportunities.	X	X
Contacts	Select this tab to add contacts to, or remove contacts from, this account. On this tab, you can also designate a contact as the *Primary Contact* for the account.	X	X
Account Hierarchy	Select this tab to view the displayed accounts in a hierarchical structure, provided that a parent account has been specified for the accounts at hand. You can expand and collapse the account hierarchy at any level to display as many or as few accounts as you like. If your administrator has not configured the solution to make account hierarchies visible, then this tab will not appear. Alternatively, if your administrator has activated the generic hierarchy structure and added accounts to it, then you can instead choose *Business Partners* > *Account Hierarchies* to view sales account hierarchies, provided that the administrator has assigned the corresponding work center and work center view to your business user.	X	X
Campaigns	Select this tab to view associated campaigns.	X	
Sales Leads	Select this tab to view or create sales leads that relate to this account.	X	
Opportunities	Select this tab to view or create opportunities that relate to this account.	X	
Attachments	Select this tab to view, edit or add attachments that relate to this account.	X	X
SAVO	Select this tab to view SAVO documents. If your administrator has not completed integration with SAVO, then this tab will not appear	X	
Sales Data	Select this tab to view associated sales data. If your administrator has not enabled integration with SAP ERP, then this tab will not appear.	X	
Sales Documents	Select this tab to view associated sales documents.	X	
Tickets	Select this tab to view associated tickets.		X
Target Groups	Select this tab to view associated target groups.	X	

Groups	Select this tab to view information that derives from SAP Jam, and to perform the following actions: • create internal groups in SAP Jam to collaborate on account team meetings, prepare for customer visits, and so on • create external or cross-company groups in SAP Jam to safeguard accounts, upsell products, and so on • automatically invite account team members and contacts to the group in SAP Jam, with the flexibility to add or remove e-mail addresses • view a list of groups in SAP Jam that are associated with the given account, and navigate from this list to SAP Jam • navigate from SAP Jam back to the account • view a list of recommended groups in SAP Jam for the given account, and navigate from this list to SAP Jam • view the latest SAP Jam Feed updates for the associated groups If your administrator has not enabled integration with SAP Jam, then this tab will not appear.	X	
Registered Products	Select this tab to view associated registered products.		X
Visits	Select this tab to view associated visits, and to set the recommended visit frequency for this account.	X	
Product Lists	Select this tab to view associated product lists.	X	X

Assigning Employees to an Account Team

1. Choose *Customers* > *Accounts*.
2. Open the appropriate account.
3. Select the *Account Team* tab.
4. Open the *Employees* pane or the *Shelf*.
5. Drag the appropriate employees from the *Employees* pane or the *Shelf* and drop them onto the *Account Team* tab.

Removing Employees from an Account Team

1. Choose *Customers* > *Accounts*.
2. Open the appropriate account.
3. Select the *Account Team* tab.
4. Find the employee to be removed.
5. Choose *Remove*.

See Also

Contacts [page 80]

Start Here for SAP Cloud for Sales

9.3.2 Contacts

Contacts are organized in relation to the accounts from which they originate. For more information, see Accounts [page 75].

On the *Contacts* tab, you can display existing contacts associated with accounts, create new contacts, and set contact statuses. You can also display contact details, review additional data, and rename and edit contacts, as required.

Once you have created a contact, it can no longer be deleted. You can, however, set its status as *Obsolete*.

Tasks

Creating Contacts

1. Choose *Customers* > *Contacts*.
2. Choose *New*.
3. Enter the *First Name* and *Last Name* of the contact, then specify the *Account* that is associated with it. If desired, enter additional details for the contact, such as organizational information, or the *Phone*, *Mobile*, and *E-Mail* of the contact.
4. Save your entries.

   If your administrator has scoped the solution to check for potential duplicate contacts, then select Check for Duplicates, before you save the contact, to ensure that its information is unique. If the information you enter is found to resemble the information of an existing contact, then the solution notifies you that potential duplicate contacts were found.

   For a description of the available save options, see Save Options.

Editing Contacts

You can edit contacts from the *Contact* item header, as follows:

1. Position the cursor over the information to be edited. For example, if you want to rename the contact, position the cursor over the *Name* field.
   As you move the cursor over an editable field, the background changes to a different color. When you click a field, you enter edit mode.
2. Change the desired entries.
   Depending on the field, use the drop-down menu or automatic search to choose an entry.
3. Save your entries.
   For a description of the available save options, see Save Options.

From the item header, you cannot edit the business address of the account that is associated with this contact, but you can use the drop-down menu to specify a different business address for this contact, if desired.

To create or edit personal addresses for the contact, choose the *Addresses* tab.

Choosing Contact Filters

Contacts are displayed in one of three standard filters, described below:

Standard Contact Filters

Filter	Contacts Displayed
All	All contacts of all accounts that you are authorized to access.
My Contacts	All contacts of all accounts for which you are assigned as a member of the account team.
My Team's Contacts	All contacts of all accounts for which you are assigned as a member of the account team, and, if you are a sales manager, all contacts of all accounts for which any subordinate of yours is assigned as a member of the account team.

The standard filters above do not include obsolete accounts. To view obsolete contacts, create and save a new filter. For more information, see Working with Lists [page 55].

The default filter is *My Contacts*, You can modify the range of accounts displayed by selecting among these filters.

Setting Contact Status

From the contact details, use the *Actions* menu to choose the following applicable status:

- Choose *Actions* > *Set as Active* to change the contact status to Active.
- Choose *Actions* > *Block* to change the contact status to Blocked, which will exclude the contact from subsequent search results.
- Choose *Actions* > *Set as Obsolete* to change the contact status to Obsolete.

You may assign a new status to a contact at any time, as required. For example, you can set any active contact as obsolete, or any blocked contact as active.

Reviewing Tabs in Contact Details

The tabs that you see in the contact details depend upon the features of SAP Cloud for Customer that your company has implemented.

Some of the tabs below are not visible by default. Assuming the features are enabled by your administrator, you must personalize the screen to make some tabs visible. For more information, watch the video Customizing Your Personal Settings .

From the contact details, you can select these tabs to perform additional actions. The following table summarizes, per feature, the tabs that are available:

Tab	Actions	Available in SAP Cloud for Sales	Available in SAP Cloud for Service and SAP Cloud for Social Engagement
Overview	Select this tab to see the latest updates made to the contact, and any addresses associated with the contact.	X	X

Feed	Select this tab to read any Feed updates that are associated with this contact. For more information, see About the Feed [page 25]. On this tab, you can also open, tag or flag Feed updates, mark them as favorites, or comment them. For more information, see Tags [page 31] and Shelf [page 30].	X	X
Addresses	Select this tab to view, edit or add addresses that are associated with this contact. It is not possible to remove an existing address from a contact, because the existing address may already be referenced by other items, such as leads and opportunities.	X	X
Activities	Select this tab to view, edit or create activities that are associated with this contact — including appointments, tasks, phone calls, and e-mails. For more information, see About Activities [page 36].	X	X
Sales Leads	Select this tab to view leads that relate to this contact. For more information, see Sales Leads [page 82].	X	X
Opportunities	Select this tab to view potential sales opportunities for this contact. For more information, see Opportunities [page 84].	X	X
Relationships	Select this tab to view associated relationships. If your administrator has not enabled integration with SAP ERP, then this tab will not appear.	X	X
Registered Products	Select *Registered Products* to view registered products associated with this contact.		X
Campaigns	Select this tab to view associated campaigns.	X	
Marketing Interactions	Select this tab to view associated marketing interactions.	X	
Tickets	Select this tab to view tickets associated with this contact.		X

See Also

Accounts [page 75]

9.3.3 Individual Customers

Individual customers are those customers who are not associated with a corporate account and do business with your company directly.

If your system has been configured to support e-mail as a channel for individual customers, then each time an individual sends an e-mail which results in a new ticket, the system automatically creates an individual customer record based on the e-mail address of the individual.

Additionally, if your system has been configured to support social media channels for customer interaction, then similarly each time an individual posts a message for the first time on one of your social media channels which results in a new ticket, the system automatically creates a customer profile based on their user account for that channel.

You can open the customer profile to view the details by clicking the customer name anywhere it appears on the user interface.

Reviewing and Editing Customer Details

General Information

Field or Feature	Description
Contact Information	The initial contact information can be limited, for example by the customer's privacy settings on the originating social media site. If you have further details you want to add to the customer's profile, for example a phone number or address, you can edit it by placing your cursor over the field and clicking inside the box that appears.
Social Information This information is only available if your system has been configured to support social media channels.	These are links to the customer's profiles, if available, on the associated social media sites. You can also assign a social profile by clicking *Edit* for the associated channel. For more information, see Reassigning an Individual Customer's Social Media Profile [page 207].

Tickets

All tickets posted directly by this customer are included on the *Tickets* tab.

You can also manually create a new ticket for the customer from this tab.

1. Click *New*.
   All the available, relevant information is pre-filled in the new ticket quick create.
2. Complete the mandatory fields and enter any other relevant information.
3. Save your entries.
   A new, open ticket is created.

Social Media Messages

All social media messages associated with this customer are listed in *Social Media Messages*.

You can delete social media messages by selecting the *Actions* icon and then *Delete*.

You can also filter and sort the social media messages in the list. For more information, see About Worklists [page 58].

Social Profiles

If the customer has an associated Twitter profile, the *Social Profiles* tab will display additional information about the customer's Twitter account, if available, as well as his or her recent tweets (Twitter Timeline), and Klout profile information.

Section	Description
Twitter Profile	Additional information about the customer's Twitter account The availability of information is based on the customer's privacy settings on Twitter.
Klout Profile	A breakdown of the customer's Klout score
Twitter Timeline	Recent tweets to or from the customer's handle, listed in real-time order

Activities

All activities related to the customer are included in the tables. You can also create new activities by clicking *New* in the relevant section.

For more information, see Activities [page 36].

Registered Products

Any products registered to the customer are displayed in the list. You can also add new registered products by clicking *New*.

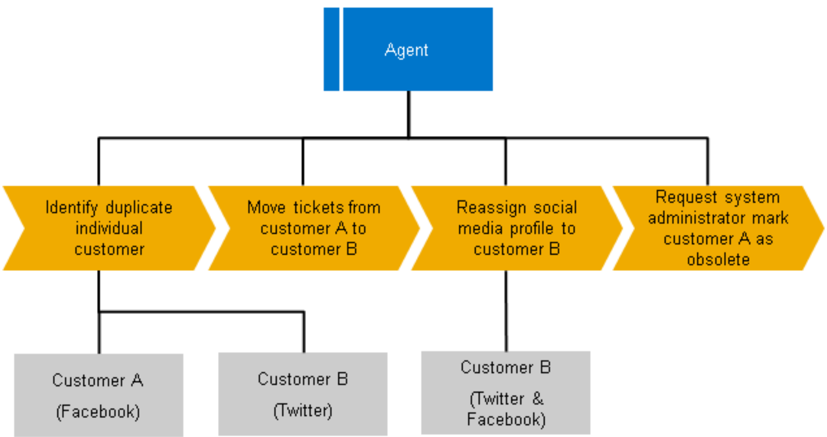
For more information, see Registered Products [page 178].

9.3.4 Reassigning an Individual Customer's Social Media Profile

You can reassign a social media profile, that is, a Facebook profile or Twitter handle, from one individual customer to another. Reassigning the social profile does not automatically reassign any other data, including any open or in process tickets—those must be moved manually.

> There are two customer records for the same individual—one created from a Facebook post (customer A) and the other from a Twitter post (customer B). You decide which of the two individual customers to keep, let's say customer B. So you transfer any open or in process tickets from customer A to customer B. Then you reassign the Facebook profile from customer A to customer B. Finally, you contact your system administrator to mark the extra individual customer, customer A, as obsolete. This will ensure that the system ignores that record going forward.

This example is depicted in the following figure:



Example of Reassigning a Social Media Profile

Tasks

Moving Tickets

Because reassigning a social media profile does not reassign any tickets, you should manually move any open or in process tickets from the individual customer whose social media profile you'll be reassigning.

1. From the *Tickets* tab of the individual customer whose tickets you want to move, open a ticket.
2. Change the customer.
   For more information, see Changing a Customer.
3. Save your entries and repeat for any remaining tickets to be moved.

Assigning a Social Media Profile

Every social media profile in the system is associated with an individual customer, so by assigning a social media profile to one, you are removing it from another.

1. Go to the *Individual Customer* details.
2. Under the *Social Information* section, click *Edit* to assign either a Facebook or Twitter profile.
3. Click the value help to find the social media profile you want to assign to the individual customer.
4. Save your entries.

> If you know that the individual customer whose profile you have just removed is a duplicate record and should be ignored by the system for further processing, then contact your system administrator to mark that customer as obsolete.

9.4 Registered Products

A registered product is one that is associated with a specific customer and for which you have recorded a unique serial number. When a ticket is created, the registered product information allows the agent to identify the unique customer product, the current valid warranty, and to determine service entitlements if any exist. Additional information, such as product location or sales channel, is used in the service process and for reporting purposes.

Tasks

Registering a Product

You register products using the *New Registered Product* tool which can be accessed from the following locations in the solution:

- From the toolbar, click *New Registered Product*.
- Under *Products* › *Registered Products*, click New.
- From the customer detail screen on the *Registered Products* tab, click New.
  When you create a registered product from a customer detail screen, the relevant information is automatically copied into the form.
- From the workspace, under *Additional Information* click the *Edit* icon for *Serial ID*, then click the *Value Selection* icon. On the resulting pop-up, click *New Registration*.
  When you create a registered product from the workspace, the customer and product information in the ticket are automatically copied into the form.

1. Enter the data for *Customer*, *Product* and *Serial ID* for identifying the registered product.

   > The registered product ID is made up of the registered product and reference product, and is a unique ID. However, the registered product is not necessarily unique. For example you can have a registered product 127 for the reference product A, and a registered product 127 for the reference product B. For this reason, the system may remind you that the number already exists if you should enter a non-unique registered product.

2. Save your entries.

Editing a Registered Product

You can review or add more information to a registered product from the registered product details screen. And similar to creating a registered product, you can access that details screen from several locations in the solution. Primarily, from one of the following:

- When creating the new registered product, rather than just saving and closing the form, you can choose instead to *Save and Open*.
- From the customer details *Registered Products* tab, click the *Serial ID* link.
- Under *Products* > *Registered Products*, select your query and then click the *Serial ID* of the registered product you want to review or edit.

Adding Product Details

The *Overview* tab is where you can enter additional details such as the product location, the owner of the registered product (if different from the customer), and notes.

> Remember to save your changes before closing the registered product details.

Adding a Warranty

1. To add a warranty for the registered product, on the *Overview* tab, click the *Edit* icon for *Warranty*, then click the *Value Selection* icon and select a warranty from the list.
2. Save your entries.
   For more information, see Warranties [page 180].

Adding Attachments

1. On the *Attachments* tab, click *Add*.
2. Select the type of attachment to add.
   - *Local File*: allows you to choose a file from your local drive and upload it to the system
   - *Web Link*: allows you to define a URL and a display title
   - *From Library*: allows you to choose an attachment from the solution library
     For more information, see Library [page 64].
3. Save your entries.

Reviewing or Adding Tickets

You can review any existing tickets related to the registered product on the *Tickets* tab. You can also create a new ticket.

1. Click *New*.
2. Review the automatically filled information and make any necessary changes.
3. Enter a subject and description for the ticket.
4. Save your entries.
   If you choose to *Save and Open*, the new ticket will open for processing in the workspace.

Review Changes

You can review the change history for the registered product on the *Changes* tab.

9.5 Warranties

You can create warranties in the system, defining their duration and any uncovered incident categories. These warranties are then available to assign to registered products.

Tasks

Create a Warranty

1. Go to *Products* > *Warranties* and click *New*.
2. Enter a name, the ID, and the duration.
   Enter the duration as a number and time unit, for example “30 days” or “30 d”, and the system will recognize this and convert it to “30 Day(s)”.
3. Under *Uncovered Incident Categories* you can add process or incident categories from your service category catalog.
   Tickets assigned an uncovered incident category are excluded from warranty coverage.

   > Service or process categories without assigned incident categories are not relevant for the warranty coverage. In column *Category Type* you can see whether you selected a process or an incident category.

4. Save your entries.
   The warranty is created in status *In Preparation*.

Activate the Warranty

To activate the warranty search for the corresponding warranty and select *Actions* > *Activate*.

Assigning a Warranty to a Registered Product

1. Go to *Products* > *Registered Products*.
2. Find the relevant registered product and open the details by clicking the serial ID.
3. For *Warranty*, click *Edit*.
4. Click *Value Selection* and select the relevant warranty.
5. Save your entries.

Uncovered Incident Categories

Under *Uncovered Incident Categories* you can assign incident categories to exclude specific issues from the warranty in case it is selected in, for example, a ticket. To make it easier you can also add service categories. In this case all incident categories underneath the selected service category are uncovered for this warranty. The same applies incident categories below another incident category.

Only the incident categories have an impact whether a warranty should be granted for a product or not. For example, if no incident category was assigned to a service category listed in *Uncovered Incident Categories* and if you then select this service category in the ticket, no warranty limitation and/or exclusion will take place.

Categories are bundled hierarchically so the higher level also includes the lower levels: *Catalog* (hidden field by default in the *Uncovered Incident Categories*) includes a selection of service categories.

A **service category** is used to categorize different kinds of service inquiries, for example, a product problem or an information request.

The **incident categories**, and all related incident categories in a lower level, are subcategories of the service categories and are used to categorize the different types of incidents. The following is an example for the service category product problem: gas boiler or electrical boilers.

- Customer Service & Support (Catalog)
  - Information Request (Service Category)
  - Product Problem (Service Category)
    - Gas Boiler (Incident Category)
      - Control Regulation Unit (Incident Category)
        - Customer Fault (Incident Category)
        - Installation Problem (Incident Category)
    - Electrical Boiler (Incident Category)
      - Control Regulation Unit (Incident Category)
        - Customer Fault (Incident Category)
        - Installation Problem (Incident Category)

A company is selling boilers. All gas boilers should have a 5–year warranty. Excluded from the warranty should be the customer fault category. The administrator creates a warranty that is valid for 5 years and selects under *Uncovered Incident Categories* the service category *Customer Fault (Incident Category)* and *Electrical Boiler*.

In the case where a customer has a problem with a gas boiler and the issue was, for example, the customer's fault, the warranty of the customer does not cover this damage. But if the damage is due to an installation problem, the damage is covered by the warranty because it was not excluded.

9.6 Analysis

Analysis is your access point to system analytical data and reports that you can use to recognize trends, measure customer sentiment, or track metrics like ticket volume or ticket completion rates.

You can also download reports and run ad-hoc analyses, either in your Web browser or in Microsoft Excel®.

Service Overview Dashboard

The *Service Overview* is a set of charts based on the reports in your system. They provide you with a snapshot of the information you find most important and can be rearranged to suit the way you work.

For more information on adding or removing reports from the overview to personalize it, see Personalizing Dashboards [page 122].

To view report details, click the *Actions* icon and choose one of the following options:

- *View with Web Browser*
  For more information, see here [page 229].
- *View with Web Browser — Quick Filter*
  For more information, see here [page 232].

- *View with Microsoft Excel®*
  For more information, see here [page 234].

Reports for the Customer Service and Social Media Features of SAP Cloud for Customer

The following reports are available from SAP, though your administrator may create custom reports that you can also choose to display in the overview dashboard (listed in alphabetical order):

Reports in SAP Cloud for Service and SAP Cloud for Social Engagement

Report	Description
Customer Count	Shows the number of customers by channel, product, and time.
Customer Sentiment Measure	Shows a customer's average sentiment over time.
Daily Average Service Request Backlog	Shows the number of daily average service requests for month-to-date and year-to-date.
Daily Average Service Request Backlog (Priority)	Shows the number of daily average service requests by priority.
Daily Average Service Request Backlog (Service Organization)	Shows the number of daily average service requests by structure, service organization, and service and support organization.
Daily Average Service Request Backlog (Top-10 Service Category)	Shows the number of daily average service requests by the top 10 service categories.
Daily Average Service Request Backlog (Year)	Shows the number of daily average service requests by year.
Operational Metrics	Shows the average handle time by agent, channel, product, and time.
Sentiment Measure	Shows the number of positive, neutral, and negative sentiments by channel, product, and time.
Service Request Backlog	Shows the number of open and in process service request backlog items per rolling week.
Service Request Completion Rate	Shows the service request completion rate by day.
Service Request Daily Average	Shows the number of service request daily average for month-to-date and year-to-date.
Ticket Activity Volume	Shows the total number of inbound ticket activities, including original messages, comments, and likes by channel and product.
Ticket Completion Rate	Shows the percentage of tickets completed by channel, product, agent, and time.
Ticket Escalation Rate	Shows the percentage of tickets escalated by channel, product, agent, and time.
Ticket Priority	Shows the average and median ticket priority scores and the number of high, medium, and low priority tickets by channel, product, and time.
Ticket Volume	Shows the number of tickets by channel, product, status, and time.
Top 5 Influencers	Shows the top 5 influencers or customers based on the Klout score or message volume by channel and product.
Top 5 Knowledge Base Articles	Shows the top 5 knowledge base articles shared with customers by channel, product, and time.
Top 5 Topics	Shows the top 5 topics identified in tickets by channel, product, and time.

10 Appendix

10.1 General Features

10.1.1 Personalization

10.1.1.1 About Personalization

You can personalize the SAP solution with your preferences. You can personalize system settings, navigation settings, content and layout settings of a screen.

When you select *This Screen* from the *Personalize* menu in the title bar, the personalize panel opens on the right side of the screen. The personalize panel contains the following sections:

- *Personalize Layout*: A list of available content for the current screen is displayed.
- *Mashups and Web Services*: A list of all available mashups for the current screen is displayed.

> Note that any changes that you make to screen sections, tables, or fields are your responsibility. If you change the name of a field or section, the help documents do not reflect your changes.

Tasks

Personalize My Settings

You can personalize your system settings, such as data and time formats in *My Settings* from the *Personalize* menu. You can also personalize your background image and related settings to change the look and feel of the solution. For more information, see here [page 215].

Display and Rename a Field on a Quick Create or Quick View Window

1. From the Quick Create or Quick View window that you want to personalize, click the Settings icon. The personalize panel opens.
2. In the personalize panel, in the *Sections* table, select the screen section where the field that you want to personalize is located.
3. In the *Fields* table, select the field that you want to display.
4. To display the field in the screen, in the *Fields* table, select the *Visible* checkbox of the field.
5. To adjust the display sequence of the field, in the *Fields* table, use the arrow buttons to move the field up or down.
6. In the *Field Properties* section, you can change the time of the field.
7. To save your changes to the current screen, click Save and close the personalize panel.

Display and Rename a Field on an Editor Screen

1. From the Editor screen that you want to personalize, open the *Personalize* menu and select *This Screen*. The personalize panel opens.
2. In the personalize panel, in the *Sections* table, select the screen section where the field that you want to personalize is located.
3. In the *Fields* table, select the field that you want to display.
4. To display the field in the screen, in the *Fields* table, select the *Visible* checkbox of the field.
5. To adjust the display sequence of the field, in the *Fields* table, use the arrow buttons to move the field up or down.
6. In the *Field Properties* section, you can change the name of the field.
7. To save your changes to the current screen, click Save and close the personalize panel.

Add a Tab to an Editor Screen

1. From the Editor screen that you want to personalize, open the *Personalize* menu and select *This Screen*. The personalize panel opens.
2. In the personalize panel, in the *Sections* table, select the *Tabs* item.
3. In the *Tabs* section, click Add. A dialog window opens.
4. In the *Add Tab* dialog window, enter the name of the new tab.
5. From the header, select the fields or groups of fields that you want to display under the new tab.
6. Drag and drop the fields into the content area of the new tab.
7. To save your changes to the current screen, click Save and close the personalize panel.

Personalize Reports

1. From the Dashboard screen that you want to personalize, open the *Personalize* menu and select *This Screen*. The personalize panel opens.
2. In the personalize panel, in the *Dashboard* table, select the report that you want to display.
3. Drag and drop the report into the content area.
4. To rename the report, in the content area, click the name of the report and enter the new name.
5. To change the display view of the report, in the content area, click the Chart icon under the name of the report and select the display view to be used to display the report. For example, you can select table view, bar view, line view, or pie view.
6. To configure the report, in the content area, click the Setting icon on the top right of the report and make the following changes if applicable:
   - Remove the report.
   - Rename the report.
   - Resize the columns in the report.
7. To save your changes to the current screen, in the personalize panel, click Save and close the personalize panel.

Personalize a Mashup

For more information, see here.

Discard Your Personalization Changes

You can discard all personalization changes that you have made to a screen.

1. Navigate to the screen, and from the *Personalize* menu, select *This Screen*.
   The personalization panel opens.
2. Click on a section of the personalization panel, for example, *Mashups and Web Services* or *Screen Layout*.
3. Click Discard.
   This discards all changes that you have made to the current screen. For example, if you are currently in the *Mashups and Web Services* section and click Discard, all changes to screen layout and embedded mashups in the screen are discarded.

10.1.1.2 Personalizing My Settings

You can personalize your system settings by selecting *My Settings* from the *Personalize* menu. Note that if you change your settings, you have to log off the system and then log on again in order for your changes to take effect.

Regional Settings

You can adapt the default system settings for the display of dates and times. You can also select a system language. This language is used only when you log on to the system with no language preference in your Web browser and without specifying any language on the logon screen.

When a user is created the solution determines the values for the regional settings based on the country used in the workplace address. If the address does not specify a country the solution uses the default settings for the USA. By default, the system language used for on-screen texts is determined by the preferred languages defined in your client, for example your web browser. The language field in the user settings is used when no preferred language is sent by the client and also when system-generated e-mails are sent to your workplace e-mail address.

In addition, the language depends on the method used to log on:

- Logging on with a user ID and password
  You can choose the language on the logon screen. The preferred languages of the client determine which language is set as a default. If none of the preferred client languages is supported by the system, English is selected as a default. You can choose any of the supported languages when logging on with your user ID and password.
- Logging on with a user certificate or single-sign on (SAML)
  No language selection is offered when user certificates or single-sign on are used for authentication. The first supported language specified by the client is used. If you have not specified a preferred language in your browser or if the preferred languages specified in your browser are not supported, the language specified in the user settings is used as logon language.

Change Password

You can change the password that you use to log on to the system. To change your password, enter the old password and then enter a new password twice to confirm that you have typed it correctly.

Manage Certificates

You can request or assign a logon certificate that enables you to log on to the system without entering your user ID and password. The logon certificate is saved to your user account on your local computer. Therefore, you can only use the certificate when you are logged on to your local computer. You can also create a certificate on each computer on which you need to access your solution. If you need to work in multiple systems, you can assign the certificate to the appropriate user of each system. However, you cannot log on to a system with multiple users using the same certificate.

You can also upload your S/MIME certificate that you need for e-mail communication with S/MIME.

Onscreen Help

By default, you are shown onscreen explanatory texts to assist you in using the system. Onscreen explanatory texts consist of text boxes that are shown at the top of a screen or screen section, and short help texts that are displayed when you move the cursor over a field that is underlined.

By deselecting the *Display Additional Onscreen Explanatory Texts* checkbox you can hide these texts.

In addition, you can activate country-specific help and learning content. This means that the standard help and learning content will be supplemented with additional information specific to the country in which you are located. To activate country-specific content, select a country from the list.

Accessibility

You can enable screen readers to read UI texts and mouse-over texts in all screens.

Personalizing My Background Image

You can personalize your background image and related settings to change the look and feel of your SAP solution. You can set an image as your personalized background image and adjust the color and transparency settings associated to the background image. For more information, see Personalize My Background Image [page 216].

10.1.1.3 Personalizing My Background Image

You can personalize your background image and related settings to change the look and feel of your SAP solution. You can set an image as your personalized background image and adjust the color and transparency settings associated to the background image.

Your changes take effect immediately and are only visible to you.

Personalize Your Background Image

1. From the *Personalize* menu, select *My Background Image*.
2. To upload your background image, in the *My Background Image* window, click Browse and choose an image file.
   The image file should be in `.png` or `.jpg` format. We recommend that the size of the image is the size of your screen resolution. The size of the image cannot exceed 1MB.
3. Choose the position of your background image. By default, the image fills the background screen.
4. In the *Color and Transparency* field, open the color pane and choose a color as a layer on top of your background image. By default, the color is black and remains invisible.
   In the *Select Color* screen, you have the following options:
   - In the color pane, click to select a starting color and move to select the color that you want to use.
   - Under the color pane, choose a recently used color.
   - Adjust the HSB or RGB settings for the color.
   - Enter a hexadecimal color code of the color. For example, enter `#FF0000FF` for blue.
5. Adjust the transparency of the color layer. By default, the color layer transparency is set to 0%.
6. Adjust the transparency of the infobars. By default, the infobar transparency is set to 100%.
7. To save your changes, click OK.

You can export your background image and related settings as a background image file. To do this, in the *My Background Image* screen, click More and then Export... .

You can drag and drop one or more images or background image files to an SAP screen and use one image or file for your background image settings.

To remove your background image and related settings, in the *My Background Image* screen, click More and then Reset All .

10.1.1.4 Personalizing Dashboards

1. Click *Personalize* at the upper right of the screen.
   Choose *This Screen*.
   A list of dashboard reports appears, as well as mashups and web services. Use the filters to narrow the list, or use search to find a specific report.
2. Drag the report title from the list to the desired chart position.
   Drop on top of an existing chart to replace the chart currently in that position; drop between charts to insert the new chart between the existing charts.
3. Drag and drop to rearrange the charts as desired.
4. Click the wrench icon at the upper right of a chart to remove, rename, or resize the chart.
5. Click *Save* above the reports list to save changes.
   You can also click *Discard* to cancel changes and revert back to the previous version of the dashboard.
6. Click the X icon at the upper right of the report list to exit Personalize mode.

10.1.2 Pricing for SAP Cloud for Customer

Overview

Pricing is based on price master data such as price lists and discount lists, which are used to automatically calculate pricing within all business documents. A predefined pricing procedure is used to determine the net value the customer has to pay for certain products to be received on a certain day at a certain place. The pricing procedure consists of price components, such as list price, discounts, surcharges, freights, and costs. The order of these price components is essential for the calculation of the total value.

Price Components

The solution contains a predefined set of price components, most of which you can activate through the business configuration. Price components can be:

- Automatically determined by the system and able to be overwritten by the user, for example, list price or automatically-determined product discounts
- Manually entered by the user, for example, a manually-entered product discount

The manual behavior is influenced by the *Manual* flag in the business configuration for pricing. If the *Manual* flag is set, the system does not find the price component automatically and it must be added manually by the user.

The following sections show the set of price components that may display depending on your configuration.

> You can influence the pricing in the fine-tune activity Configuration: Price Strategy.

List Price

This price component is naturally the first step of a pricing procedure, because many price components such as discounts or surcharges depend on it. To determine the net list price, the system checks all price lists that fit the parameters passed from the sales or service document. These parameters are customer, customer group, distribution chain, and date.

Price lists can be customer specific, distribution chain specific, and base price lists. The price lists are maintained as price master data, have a validity period, and need to be released before they are active.

Because the customer may have special prices, the system checks first for a customer-specific price list. If there is no customer-specific price found, then it checks for a distribution chain specific price list. Finally, if there is no distribution-chain-specific price, it checks for the base price list. You have to ensure that the system can find a price for all products or services you sell in the base price list at the very least. Prices can be manually revised within a sales or service document, allowing you to flexibly adjust your net prices.

> An approval procedure can be activated for price lists and discount lists which is done in the business configuration in the scoping (under *General Business Data* > *Product and Service Pricing*). If this setting is active, the line manager automatically receives an approval task should his or her employee try to release a price or a discount list. The price list or discount list cannot be released and included in all business documents for sales until the line manager (or representative) approves the price list or discount list. If a manager is authorized to approve price and discount lists, he can directly release the price or discount list in the price master data view. This automatic approval is done without creating a business task if the manager himself releases the prices.

Product Discount (%)

To determine the discount, the system checks all discount lists that fit the parameters passed from the sales or service document. All found discounts are considered in the price calculation.

Discount lists can be Customer Specific Discount Product, General Customer Discount, Overall Customer Group Discount, and Customer Specific Discount Product Category discount lists.

Because the customer may have a special discount for a certain product, the system checks for a discount list with customer product discounts.

Discounts can always be revised manually within a sales or service document, allowing you to flexibly adjust discounts.

> An approval procedure can be activated for price lists and discount lists which is done in the business configuration in the scoping (under *General Business Data* > *Product and Service Pricing*). If this setting is active, the line manager automatically receives an approval task should his or her employee try to release a price or a discount list. The price list or discount list cannot be released and included in all business documents for sales until the line manager (or representative) approves the price list or discount list. If a manager is authorized to approve price and discount lists, he can directly release the price or discount list in the price master data view. This automatic approval is done without creating a business task if the manager himself releases the prices.

Surcharge

Two different price components are available for surcharges. You can define surcharges as percentages or fixed amounts according to your needs. All surcharges can be used side by side.

Total Item Net Value

This is calculated by adding all the item net values. This value cannot be edited.

Cost and Profit Margin

Cost displays only if profit margin is included in your business configuration. A cost estimate can be manually entered and makes the calculation of the profit margin possible.

Overall Discount (%)

The overall discount (%) is an additional general discount applied to the total item net value. This can only be applied manually.

Total Net Value

This is calculated by adding all the item net values plus freight. This value cannot be edited.

Total Given Discounts

This is calculated by adding all the relevant product discounts given. This value cannot be edited directly by the user. It can be influenced by editing the product discounts at item level.

Rounding Difference

This is a value that has been lost or gained through rounding. This value is used only for currencies that do not have low denomination coins such as 1c or 2c – for example, Swiss francs or Australian dollars. For these currencies, the price must be rounded to the nearest available value, such as 0c or 5c.

Total

This is calculated by adding the total net value.

Price Calculation

Pricing is centrally implemented in this solution and linked to all relevant business processes. The procedure is predefined and you cannot modify the procedure or create a new one.

The pricing procedure controls which price components are automatically calculated for the relevant business documents, such as sales quotes. It contains the most commonly-used price components, including product prices, discounts, and surcharges. These various kinds of price components can be combined and control the price calculation process.

The pricing procedure also contains the sequence in which the system takes these price components into account during pricing. It calculates the net prices. The pricing procedure also determines:

- Which subtotals will be considered during pricing
- To what extent pricing can be processed manually
- Which method the system uses to calculate percentage discounts and surcharges
- Which requirements for a particular price component must be fulfilled before the system takes the element into account.

Currency and Quantity Conversion

During the price calculation, currency conversion occurs if the currency of the price master data differs from the document currency, depending on the exchange rates maintained as master data. The document currency is defaulted from the account master sales data or from the selling company data.

In addition, during the price calculation, quantity conversion occurs if the unit of measure requested in the document differs from the price unit maintained in the price list. A prerequisite is that the quantity conversions are maintained in the product master data. For example, product master data maintains a quantity conversion “1 pallet = 20 each”, the price list specifies a price unit of “$50/1 each”, and the sales quote requests 5 pallets - in this case, the 5 pallets are converted to 100 units and price is calculated at $5000.

Scales

You can define scales for prices which depend on different quantities. The scale you use determines how values are calculated. For example, you can use a scale to define that a single boiler costs $500, but if you buy at least 10 boilers the price decreases to only $450 per unit.

10.1.3 Party Processing for SAP Cloud for Customer

Overview

Business partners is the superordinate term for all of the companies and people with whom you are in contact in your daily business. Business partners can be, for example, accounts, contacts, partners, or employees. When you create a document such as a sales quote, you can indicate that business partners you created in the master data are involved parties for this specific document. Roles are assigned to each party to define the party’s purpose. Business partners can take on multiple party roles in a business document. For example, often in sales quotes the account, ship-to, and bill-to party roles are identical.

In SAP Cloud for Customer, you can automatically determine all involved parties for business transactions and documents using roles, determination rules, parties, addresses, and master data. The *Involved Parties* tab, for example in a sales quote, displays all parties and contacts.

Business Partner and Parties

- Business Partners
  Business partners are all the companies and people with whom you are in contact in your daily business. When you begin your work, you first create master data in the system by entering kinds of the business partners that you require for your daily work, and the term 'business partner' is the superordinate term for the following entities in your system:
  - Accounts
  - Individual Customers
  - Contacts
  - Partners
  - Partner Contacts
  - Competitors
  - Employees

  Business partners can also be used for:

    - Storage and display of information in a business transaction. The information collected from the business partner does not affect the behavior of the system.
    - Relevance in business processes: the way a business process performs depends on the business partner. This means that the system behaves differently or uses different data depending on the selected business partner.
    - Analytics and Reporting: here you can drill down on several business partner attributes and party roles. For example, sales manager Bob Menson wants to drill down the sales per sales unit in reporting. He assigns the party role *Sales Unit* to every sales quote to enable the drill down.
- Parties
  If you create a document, for example, a sales quote, you can indicate that business partners you created in the master data are involved parties for this specific document. Parties use business partners that have a special purpose in a document. Party roles are assigned to each party to define the party's purpose.
- Party Roles
  Business partners often take on multiple party roles in a business document such as a business document sales quote. Business partners are assigned to party roles in a specific document to indicate the purpose of the business partner in that document. It is often the case in a sales quote that the account, ship-to, and bill-to are identical: if Silverstar Wholesales Inc. wants to purchase the heating installation, receives the goods, gets the invoice, it has all four party roles in the sales quote.
- Party Role for Employees
  With the Employee Responsible role you can define which employee in your organization is responsible or accountable for a single document. Often, this employee also has tasks to fulfill or is responsible for updating the document.
- Party Roles for Organizational Units
  Organizational units reflect the organizational structure of the company. Organizational units can define companies, sales organization, and sales units.
- Special Case: Companies
  Companies occur both as an internal and external business partner in your master data.
  Once you enter a company into the organizational hierarchy, a corresponding business partner with Account as business partner role is created automatically.

  > The company ID in organizational management does not need to be the same as the account ID in the master data.

- Contact Role in Documents and Master Data
  You can enter one or several contacts for an account in your master data. This allows you, for instance, to call the right person in a particular company directly instead of using the central company phone number. However, it might be helpful to enter a contact person for a party into the document as well.
  Contacts are always related to a party in a document. That means this person is the one you contact if you have questions about this party for the party role.

Parties in Documents

- Consistency Checks on Parties Used in Documents
  There are several consistency checks performed when a business partner is used in a party role for a document. These checks ensure that the document created is correct and consistent and are done for the following reasons:
    - The checks guarantee that the complete business process runs smoothly without interruption, for example, due to missing data

- Legal compliance for accounts
- The checks help the employee to create the document according to the business rules entered in the master data

There are other checks that affect whether you can change a party role. Some of the parties are never changeable, which means the field is always read-only or the will become read-only under certain conditions, or in a certain document status. In some cases parties that were once read-only can become editable, for example, if a change was reverted. Parties are set to read-only to guarantee the consistency of the business processes or since this has been defined by you in business configuration.

- Determination of Parties
  If you are creating a new document in the system, such as a sales quote, the document initially has no parties assigned. Once the account or contact party has been entered, other party roles, such as employee responsible, ship-to or bill-to are determined automatically. These automatically determined parties are only proposals and you can change them if the status of the document allows it.
  Parties are automatically re-determined when a document is changed. Re-determining means that a party in a party role has been already found. When the user changes certain data, the system determines that another party is better suited for this party role.
  Automatic re-determination of parties is disabled in the following cases:
  - Parties for this party role cannot be changed anymore.
  - If a party role has been changed manually by the user. This is based on the following: if the user already changed the data manually, he or she does not want to allow further automatic changes since this would cause confusion. Thus, the system does not change parties of a party role that were changed manually by the user.
- Error Handling
  If you often encounter the problem that the system finds the wrong party or none at all, here are a few suggestions:
  - The configuration of the party determination steps do not match your business case. In this case you can enable and disable party determination rules.
  - The master data required to automatically determine the parties is missing, insufficient, or inconsistent: check the different steps for determining a party role for a certain document type in the corresponding business configuration and enhance or correct the master data as described for the different determination rules.

You can create a new document based on an existing document.
In this case the data, including the parties from the existing document, is copied to the new document. However, there are fixed rules for copying parties from one document to another document. You cannot change the rules. They depend on the following:

- What kind of document the source document is, for example, sales quote, opportunity, or e-mail activity.
- What kind of document the target document is.
- Which party roles exist in the source document, for example, an e-mail activity has no bill-to party to be copied.
- Which party roles exist in the target document, for example, if there is no Bill-to in the target document.

The rules are as follows:

- A party role is copied one-to-one from the source document to the target document, for instance, the ship-to party of a sales quote is copied to the ship-to party of the sales quote.
- A party role is not copied to the target document due to organizational reassignment. This is basically the case for the party roles employee responsible or sales unit. The employee responsible or sales unit of a sales quote is not copied to any copied document. The system will trigger a new party determination for those roles.

Party Roles in Documents

- Using a New Party Role in a Document
  The prerequisite for using a party role in a document is adding it to the parties relevant for this document type. You can then add a party with the newly created party role on the *Involved Parties* tab of the corresponding document. Automatic determination occurs when the flag *Responsibility* is set in the party role.
  You then have to maintain a responsibility as follows:
  - Maintain a directly responsible party in the account master data
  - Maintain an employee who is indirectly responsible: This can be achieved if the employees are not directly responsible (manual assignment) for the accounts. Responsibility depends on customer attributes such as country, region or postal code. You enter a responsibility for the employee party role, such as a region. If a sales quote is created with a region that matches this responsibility, the corresponding employee becomes the default.
- New Party Roles in Copied or Follow-Up Documents
  A new party role that you introduce can be copied from one document to another. The prerequisite is simply that the new party role you defined has been added to both the source and target document.

Direct responsibilities are more important than indirect relationships. That is, if there is a direct responsibility entered for an account in the corresponding party role, the indirect responsibility becomes irrelevant.

Usage of Addresses

In order to describe how addresses are used, it is useful to distinguish between the address of a business partner that is only valid for this business partner and the relationship address which makes sense on a relationship between two business partners.

Types of Addresses

- Address of a Party
  Address of a party means that this address is related to one party only:
  - There is no relation to a second party for this address.
  - The address can have several purposes. For example, an address might be suitable for delivering goods or it might be the relevant address for sending invoices to a customer.
  - An address might also have several simultaneous uses.
- Relationship Address
  Relationship addresses are never for only one party, but describe an address for a relationship between two parties. The relationship address data comes from both parties. There are two kinds of relationship address:
  - Employee relationship address
    This describes the address where an employee works. The first party of the relationship is the organizational unit, for example, a company, a sales unit, or a service unit. The second party is the employee. Address data, such as country, city or postal code, is derived from the organizational unit. Address data, such as building, e-mail address or direct telephone number belong to the employee. Together they build the relationship address of the employee at this organizational unit.
  - Contact relationship address
    This is similar to the employee relationship address, but represents the external view. That is, the person in the relationship is a contact in another company. The first party is typically an account. The second party is the contact. The contact relationship address describes where this contact works in this company and how you can contact him or her. Note that account and contact can have more than one

relationship address to another party. For example, a consultant works for several accounts and has several workplaces at those companies and an account can have several contacts.

Automatically Defaulted Address of a Party

When you add a party or a party is automatically determined by the system, the system defaults to the standard address that is generally the most suitable, depending on the role of the party and the available addresses of the business partner in the master data. You can change the default address.

Note that if there is no default address and you do not enter an address, only the party name is used. However, you can add an address for the party within the master data or choose it manually.

Setting Up Party Processing

To support the automatic determination of the party roles in your party schema, you must perform the following activities:

1. Define new party roles, such as internal and external involved parties, with the *Party Role Definition* fine-tune activity. These new roles can be used for specific documents, for example, sales quote or opportunity, as additional involved parties. A party role describes a person or an organization that is involved in your specific transaction.
   The configuration delivers pre-defined party roles that are marked as *Responsibility Role*, which contains frequently used internal party roles such as employee responsible or service performer.
   - *Party Role Code*: The code, which can be up to ten characters in length, used to identify the party role. Enter the code to identify the party role. This code must begin with a `Z` — for example, `Z123456789`.
   - *Description*: The text to describe the party role used in a document and account assignment.
   - *Party Category*
   - *Responsibility Role*: Indicates whether a party role should be used to assign employees to accounts. The flag should only be used for internal party roles, such as employees. Pre-defined party roles from SAP marked with the *Responsibility Role* flag cannot be deleted or renamed. These party roles are available for responsibility assignment of employees. The pre-defined roles are also already defined in the party schemas and cannot be added or changed. In addition, the assignment of responsibility roles can be defined as follows:
     - Directly through manual assignment in the account master data.
     - The party with the corresponding Z-role is assigned to a territory. And in case a document falls in the responsibility of the corresponding territory, the appropriate party and Z-role are assigned to the document. But this is only valid if the account has not a party with the Z-role.
     - Indirectly through rule-based definitions — for example, regional attributes, such as postal code.

     Responsibility roles used in the party schema will be determined based on the account assignments. If you don't flag a role as a responsibility role, the role can be maintained manually in the document under *Involved Parties* if the new party role has been assigned to the party schema.
2. Add these party roles to your party schema, for example, add the party roles for sales quotes in *Involved Parties* in the *Sales Quotes* fine-tune activity. This activity is also available under *Opportunities* and *Sales Leads*.
   - Adding or editing party roles
     1. Click *Maintain Involved Parties*.
     2. Under *Party Role Assignments* click Add Row.
     3. Select a *Party Role* from the drop-down list.

4. Decide whether the role should be, for example, active, mandatory, unique, or should be forbidden for manual changes.
5. Save your changes.
6. Then click *Maintain Determinations* where you can edit the determination for the newly added party role.

- Deleting role assignments
  1. Select the line you want to delete.
  2. Click Delete.

> You can delete only self-created assignments. Pre-delivered content cannot be deleted.

Party roles pre-delivered by SAP cannot be renamed or assigned to other party schemas.
If you add a new role the following determinations are added automatically:

- Direct Responsible of Account
- `<Party Role>` assigned to Territory
- Responsibility `<Party Role>`

3. If you use the flag *Responsibility Role*, maintain the account assignment of employees in master data or territory assignment.
Note that the *Responsibility Role* flag should only be applied to party roles for employees.
If the *Responsibility Role* flag has been selected, you can maintain the following types of responsibilities for this party role:
   - Maintain a direct responsibility for an account. The party role is proposed in a drop down list in account master data, under *Responsibilities*. For example, employee Kate Jacob is directly responsible in a party role for the account Silverstar Wholesales Inc.
   - Maintain a territory responsibility for an account. Though, for example, Bill Smith, the employee responsible for accounts in Florida, is automatically assigned to sales quotes with accounts in Florida.
   - Maintain an indirect responsibility for accounts. For example, employee Susan Thomas is responsible for all accounts in Nevada. You do this in the *Administrator* work center under *General* > *Work Distribution* > *Employee Work Distribution*.

Determination Rules

You can display the determination rules of a document in the corresponding fine-tuning activity. The following paragraphs describe how to influence the determination by entering master data, if applicable, for the determination rule.

- `Business partner relationship of <Party Role>`
  Example: Business partner relationship of Account
  In the *Contact* view in the master data of accounts, you can enter different relationships types, such as *Has Ship-to Party*, for other business partners. The relationships are then used to automatically determine related business partners when a document is created.
  What to do if the wrong party or no party is found with this step:
  - Add or remove a relationship in the master data of the account.
  - Change the default relationship in the master data of the account.
  - Disable the determination rule in the *Business Partner Relationship of 'party role'* fine-tuning activity.
- `Functional Organizational Unit of <Party Role>`

Example: Functional Organizational Unit of Employee Responsible
You can determine the sales unit by the sales unit assigned to the employee responsible for a document; for example, Kate Jacob is assigned to the reporting line unit "Sales Office New York". With this step, the party role "Sales Unit" is preset for the employee responsible.

- `Organizational Unit from Org Model if only One Suitable Functional Unit Exists`
  If only one organizational unit is set up in organizational management with the relevant functional unit, the organizational unit is selected as the relevant party.
  Example: Only one sales unit is set up in the organizational model. This single sales unit is automatically determined as the relevant sales unit in a sales quote.
- `Copied from <Party Role>`
  Example: Copied from Account
  This determination step copies the business partner from one party role to another party role, as required. For example, the *Ship-to*, *Bill-to* or *Payer* party is automatically derived from the *Account* party, if they are identical, for example, it is the same customer.
- `Responsibility "<Name of Responsibility>"`
  Example: Responsibility "Employee Responsible for Sales"
  This determination step sets the default for the organizational unit or employee role according to the rules defined in the responsibilities for employees and organizational units. For example, you defined a determination rule by region for customers located in New York. For these customers only, a certain sales unit or certain employee is responsible. Then all documents with accounts that have an address in "New York" are assigned to this sales unit or employee responsible according to the determination rule entered previously.
- `<Name of Party Role> of Account` or `<Name of Party Role> of Territory Team`
  This determination step can be set for party role *Employee Responsible*, *Sales Employee*, and customer-specific party roles. This determination step sets the default for the role to the employee entered directly in the account master data under *Account Team*.
  You can find the territory data either on the *Account Team* or on the *Sales Team* tab, in case there are more then one territory.
- `Current User`
  This determination is relevant for employee roles. It can be enabled in business configuration for employee and customer-specific party roles. The party role becomes the default when the logged-on user who initially creates a document performs this determination step. For example, Kate Jacob creates a sales quote. With this determination step she would be assigned to the *Employee Responsible* party role.
  With this determination you can determine general and customer-specific party roles by the current logged-in user.
- `Contact of Account`
  This determination step deviates either the account from the contact or vice versa.
- `Account's Sales Data`
  This determination step deviates the organizational data from the account's sales data.

Recommended Combinations of Party Roles and Business Partner Roles

The following table explains the meaning of each party role, and recommends which business partner roles should be combined with those party roles.

Party Role	Party Role Description	Business Partner Role
Account	A party that purchases goods or services.	Account or Individual Customer
Contact	A party that is the contact in a document.	Contact or Partner Contact
Ship-to	A party to which goods or services are supplied.	Account or Individual Customer

Party Role	Party Role Description	Business Partner Role
Bill-to	A party that receives the bill for the goods or services supplied.	Account or Individual Customer
Sender	A party from whom the message originates.	Employee, Contact, Partner Contact, or Individual Customer
Recipient	A party that is to receive a message.	Employee, Contact, Partner Contact, or Individual Customer
Recipient (CC)	A party that is to receive a copy of a message.	Employee, Contact, Partner Contact, or Individual Customer
Recipient (BCC)	A party that is to receive a copy of a message without the other recipients' knowledge.	Employee, Contact, Partner Contact, or Individual Customer
Service and Support Team	A party that is responsible for the processing of customer complaints.	Organizational Unit with Function 'Customer Service'
Sales Partner	A party that initiates and performs business transactions for another company.	Partner
Partner Contact	An employee of a sales partner.	Partner Contact
Organizer	A party that is responsible for the organization of an appointment.	Employee, Contact, Partner Contact, or Individual Customer
Attendee	A party that is required as an attendee of an appointment.	Employee, Contact, Partner Contact, or Individual Customer
Employee Responsible	A party that is responsible for something. Often, this employee also has tasks to fulfill or is responsible for updating the document. The party can be an internal or external employee.	Employee or Partner Contact
Processor	A party that processes a task or a ticket.	Employee or Partner Contact
Activity Contact	A party that has a reference to the current activity.	Contact or Partner Contact
Service Performer	A party that performs services.	Employee or Partner Contact
Sales Unit	An organizational unit that is responsible for the sales and distribution of products in business processes.	Organizational Unit with Function 'Sales'
Call Participant	A party that participates in real-time communication, for example, a phone call or Internet chat session.	Employee, Contact, Partner Contact, or Individual Customer
Sales Employee	A party that is included in the sales department of an enterprise, or that carries out sales tasks.	Employee or Partner Contact
Organizational Unit	An element of your organizational model that is assigned to an activity.	Organizational Unit

10.1.4 Keyboard Navigation

The SAP solution aims to comply with the keyboard standards of your operating system. You can use the keyboard to reach active screen elements and use the associated functionality in the solution.

To print this document, press CTRL + P .

Navigation Keys

You can use the following hot keys to navigate SAP screens:

Tasks	Hot Keys (Supported by Mozilla Firefox Web Browser 3.6 or Higher)	Hot Keys (Supported by Microsoft Internet Explorer 8 or Higher)
Go to the next UI element.	TAB	TAB
Go back to the last UI element.	SHIFT + TAB	SHIFT + TAB
Go to the next UI section.	F6	CTRL + TAB
Go back to the last UI section.	SHIFT + F6	SHIFT + CTRL + TAB
Open a link.	SPACEBAR	SPACEBAR
Trigger the default action of a field or button; open a link.	ENTER	ENTER
Move between options in a drop-down list or in a group of options, such as quick links.	Arrow keys	Arrow keys
Go to the previous tab.	CTRL + SHIFT + P	CTRL + SHIFT + P
Go to the next tab.	CTRL + SHIFT + N	CTRL + SHIFT + N

Function Keys

You can use the following hot keys to use certain functions in the SAP solution:

For keyboard shortcuts that contain two or more keys, you press these keys simultaneously and let go of the last key first. In the table, these keys are separated by a plus sign (+).

Tasks	Hot Keys (Supported by Mozilla Firefox Web Browser 3.6 or Higher)	Hot Keys (Supported by Microsoft Internet Explorer 8 or Higher)
Save your data.	CTRL + S	CTRL + ALT + S
Log off.	SHIFT + CTRL + Q	SHIFT + CTRL + Q

As an administrator, you can use the following hot keys in the administration screens of the SAP solution:

Tasks	Hot Keys (Supported by Mozilla Firefox Web Browser 3.6 or Higher)	Hot Keys (Supported by Microsoft Internet Explorer 8 or Higher)
Save your data and close the screen.	CTRL + W	CTRL + ALT + W
Save your data.	CTRL + S	CTRL + ALT + S
Close the screen.	CTRL + Q	CTRL + Q
Refresh the worklist.	CTRL + R	CTRL + ALT + R
Open basic or advanced find in the worklist.	CTRL + G	CTRL + ALT + G
Open filter in the worklist.	CTRL + H	CTRL + ALT + H
Add a new row in the worklist.	CTRL + INSERT	CTRL + INSERT

Delete a row in the worklist.	CTRL + DELETE	CTRL + DELETE
Expand a group in the hierarchy list.	CTRL + +	CTRL + +
Collapse a group in the hierarchy list.	CTRL + -	CTRL + -
View all information in a business document.	SHIFT + CTRL + A	SHIFT + CTRL + A
Log off.	SHIFT + CTRL + Q	SHIFT + CTRL + Q

10.2 Analysis

10.2.1 Working with Reports

10.2.1.1 Viewing Reports with the Web Browser Option

Overview

Viewing reporting with the *Web Browser* option allows you to execute ad hoc analyses. You can open reports from the reports list in the *Reports* view and from embedded reports.

Administrators use a limited range of functions as described below to preview data sources.

Functions in the Content Area

Display

In the content area for the report, data is displayed in a table or chart depending on settings. You can switch the display format of the report. You can also undo a step or revert to the last saved state of the report.

You can also sort data in ascending or descending order.

Analytical Navigation

In cells of reports displayed in table format, you can use the context menu for further navigation and analysis. Using the context menu, you can view existing documents related to a value. When you double-click a cell, the documents and reports to which you can navigate are displayed. For example, you can navigate to a preceding document, such as a purchase request, an overview document that provides information about a customer, or to another report.

Functions in the Navigation Pane

In the navigation pane, you can find functions to make display settings. Analysis functions are also available to display certain values.

The following table provides an overview of display settings and analysis functions available for key figures and characteristics:

Key Figures	Characteristics
Display	Display

Key Figures	Characteristics
Hide	Hide
Decimals	Adding Attributes
Scaling	Displaying Hierarchies
Conditions	Conditions
Exceptions	Exceptions
Sorting	Sorting

Display Settings

By clicking Settings, you can determine how characteristics and key figures are displayed in the report along with making settings for charts and tables.

Creating Exceptions and Conditions

To create conditions and exceptions for the report, under *Columns*, click the dropdown list for *Key Figures*. You can create, edit, and delete exceptions and conditions by choosing *Manage Exceptions* or *Manage Conditions* accordingly.

Selecting Key Figures

To add additional key figures to the report from the available key figures or to remove them from the report, from Settings, choose *Key Figures*.

You can determine the order in which key figures appear as columns in your report by moving them up or down in the list accordingly.

You can also decide if you want to display technical IDs by clicking Show ID.

Displaying Characteristics and Key Figures

You can drag and drop characteristics and key figures in columns and rows to the *Not Currently Shown* list. To drag and drop, you use the Move function. This function is available from the dropdown list from the characteristics and key figures. If you select *Remove*, the characteristic or key figure is moved to the *Not Currently Shown* list.

Toolbar Functions

- Close
  Closes the Web browser window.
- View
  You can save the current report view, save the report view under a different name, and manage the report views.
  Under *Manage Views*, you can set a report view as default, rename, or delete personal report views.
- Settings
  You can determine how characteristics and key figures are displayed in the report along with making settings for charts and tables.
- Selections
  You can set values for filter and variables in the *Selection* area, and manage selections. You can decide whether to hide or show the *Selection* area before starting a report using the start options.
  The start options indicate whether the *Selection* area is displayed. By default, the *Selection* area is displayed, but the report is not started. Note that if you set the start option to *Hide Selection Area and Start Report*, the next time you start the report, the system uses the existing set of variables with the current value selections.

To close the selection area, click the icon to the right of the *Start Options* dropdown list.

- Add Fields
  You can add fields, such as characteristics and attributes of a characteristic, to the report. You can also add variables and hierarchies as variables. For more information, see Add a Field to a Report.
- Print
  Allows you to print the report using one of the printers connected to your computer.
- Download
  Downloads the report to Microsoft Excel® in XML or CSV format. Note that the report opens in read only mode. You can also download data sources in CSV format.
  The format and the available fields of the downloaded data source differ from a downloaded report. For example, in a downloaded report, the value and unit of measure are combined in one field whereas in the downloaded data source, the fields are separate. Another example is that there may be key figures only defined for the report, which are not available in the underlying data source.
  To perform ad-hoc analyses, you must open the report in Microsoft Excel®. From the *Reports* work center view, click View With, and choose the *Microsoft Excel* option.
- Send
  You can send the report as an e-mail attachment or as a link.
- Chart and Table
  Switch the display of the report to a table, chart, or display both formats.
- Navigate To
  You can navigate to a different tool with which to view and analyze the report.
- *View*
  Shows the report view that is displayed in the Web browser. The dropdown list displays the report views that are available with the corresponding report. A report view is a modified view of the data available with a report. You can also define one or more views for a report. You define a view by saving the current status of a report.
- *Selection*
  Shows the saved set of values for the filter and variables currently used with the report. The dropdown list shows the selections available with the report.
- Set as Default
  Sets the current report view and defined selection as default. Selections can also be set as default in the *Selection* area. For selections, the last set default is valid whether the default is set in the Web browser or from the *Selection* area.

Report Header

The report header is located to the right of the toolbar. By clicking the *Show Report Header* icon, the system displays the access context, selection ID, and any filters set. If available, any information and warnings are also displayed. For example, if the display currency is set using key figure settings or variables.

You can also view technical information about the report, such as the report ID and the data source for the report.

Note that you can also undo the last step or go back to the default view and selection.

10.2.1.2 VIDEO: Working with Report Details

Video

Working with Report Details (4m 37s)

Find out how to modify a report in the Web Browser view and how to add it to your dashboard.

10.2.1.3 Viewing Reports with Web Browser — Quick Filter

Overview

Viewing reports with the *Web Browser – Quick Filter* option allows you to quickly filter data that can be displayed as a chart, table or both. You can open reports from the reports list in the *Reports* view and from embedded reports.

Toolbar Functions

- Close
  Closes the report.
- View
  You can save the current report view, save the report view under a different name, and manage the report views.
  Under *Manage Views*, you can set a report view as default, rename, or delete personal report views.
- Save
  You can save the displayed report view and selection as default.
- Settings
  Enables you to change the layout of the report and make display settings. The following options are available:
  - *Characteristics*
    On the Edit tab page, you can select characteristics to be displayed in the report.
    For information about other characteristic settings, see here.
  - *Key Figures*
    On the Edit tab page, you can select key figures to be displayed in the report.
    For information about other key figure settings, see here.
  - *Exceptions*
    Enables you to identify deviations from threshold values or intervals.
    For more information about exceptions, see here.
  - *Conditions*
    Enables you to restrict the results area of a report in accordance with certain criteria.
    Note that conditions only restrict the results displayed in a report; they do not restrict the value available with characteristics in the quick filter area.
    For more information about conditions, see here.
  - *Table*
    Enables you to make display settings for the report when displayed as a table.
    For information about table settings, see here.
  - *Chart*
    Enables you to make display settings for the report when displayed as a chart.
    For information about chart settings, see here.
- Selections
  You can set values for filter and variables in the *Selection* area, and manage selections. By default, the *Selection* area is closed.
  For more information about working with selections, see here.
- Print

Allows you to print the report using one of the printers connected to your computer as a table or chart, independent of the current display.

- Download
  Exports the report to Microsoft Excel® in XML or CSV format. Note that the report opens in read only mode. The format and the available fields of the downloaded data source differ from a downloaded report. For example, in a downloaded report, the value and unit of measure are combined in one field whereas in the downloaded data source, the fields are separate. Another example is that there may be key figures only defined for the report, which are not available in the underlying data source.
  To perform ad-hoc analyses, you must open the report in Microsoft Excel. From the *Reports* work center view, click View With, and choose the *Microsoft Excel®* option.
- Send
  You can send the report as an e-mail attachment or as a link.
- Table and Chart
  Switch the display to a table, chart, or both table and chart.
- Navigate To
  You can navigate to a different tool with which to view and analyze the report.
- *View*
  Shows the report view that is displayed in the Web browser. The dropdown list displays the report views that are available with the corresponding report. A report view is a modified view of the data available with a report. You can also define one or more views for a report. You define a view by saving the current status of a report.
- *Selections*
  Shows the saved set of values for filter and variables currently used with the report. The dropdown list shows the selections available with the report.
  By clicking *Selections* , and choosing *Manage* , you can set a selection as default, rename, or delete selections. Note that the *Initial* selection cannot be deleted and is not available on the Manage tab page.
- Set As Default
  Sets the current report view and defined selection as default. Selections can also be set as default in the *Selection* area. For selections, the last set default is valid whether the default is set in the Web browser or from the *Selection* area.

Quick Filter Area

In the *Quick Filter* area, from the *Characteristics* list box, you can select from all characteristics available with a report.

The *Characteristics* list box contains the characteristics available with the report. To display the values available with a characteristic, click the characteristic. The characteristic then appears to the right of the *Characteristics* list box.

Values can then be selected and deselected. To support a quick selection of values, the list boxes provide sorting and filter functions for values. The report data which is displayed in the chart and table changes when you change values in the *Quick Filter* area.

Note that when you remove a characteristic from the *Quick Filter* area, any values that you have selected for the filter are removed.

> The values available with the characteristics are restricted to the value selections that you set using the variables in the *Selection* area.
>
> Any changes you make to the value selections for variables in the selection affect the value selections available to be filtered for characteristic. The system resets any filter value selections you have made if you change the values selections set in the selection and start the report again by clicking Go.

The order of characteristics in the *Characteristics* list box and the order as displayed in the report is set using characteristic settings. The order of characteristics in the *Characteristics* list box is alphabetical, starting with selected characteristics, and then the available characteristics.

The order of characteristics that you have selected to filter in the *Quick Filter* area has no effect on the order of characteristics as displayed in the report.

Content Area

In the content area for the report, data is displayed as a table, chart, or both, depending on settings. You can switch the display format of the report.

Analytical Navigation

In cells of reports displayed in table format, you can use the context menu for further navigation and analysis. Using the context menu, you can view existing documents related to a value. When you click a cell, the documents and reports to which you can navigate are displayed. For example, you can navigate to a preceding document, such as a purchase request, an overview document that provides information about a customer, or to another report.

10.2.1.4 VIDEO: Using the Reports Quick Filter

Video

Using the Reports Quick Filter (4m 42s)

Find out how to use the quick filter for reports to close more deals.

10.2.1.5 Working with Reports and Plans in Microsoft Excel®

Overview

The SAP add-in for Microsoft Excel enables you to execute ad hoc analyses, create workbooks, create plan data, and define sales targets.

- Microsoft Excel-Based Reporting
  You can open reports from the workbooks and reports list in a *Reports* work center view by clicking View With and choosing the *Microsoft Excel* option. You can also open reports directly in Microsoft Excel by logging on the SAP system.
  Administrators can create design workbooks and make them available for business users from the *Business Analytics* work center.
- Microsoft Excel-Based Planning
  To overcome the limitations of the conventional approach of planning in spreadsheets, business planning consists of features to enable planners to efficiently obtain and work with planning data in business environments.

Analytic Features

> To view and work with Microsoft Excel-based reports and plans, ensure that the add-in for Microsoft Excel is installed.
>
> Depending on your authorization, you can download the add-in from the following locations:
>
> - By clicking *Download* in the top right corner of the solution.
> - From the *Self-Services Overview* work center view of the *Home* work center under *Install Additional Software*.
> - From the *Download Center* work center view of the *Application and User Management* work center.

The analytic features in the add-in tab enables you to save workbooks to the solution system. You can also use available Microsoft Excel functions. Depending on your access rights, different workbooks and reports are available. Saved workbooks are then available from different work center views. Note that the functions available to you depend on your access rights and work center and work center view assignments; the reports you work with in a Web browser are also available using the add-in for Microsoft Excel.

Administrators

Administrators can create and edit public workbooks as follows:

1. Open the public or personal workbook.
2. Switch to design mode by clicking Design Workbook.
   If you want to view the workbook with generated test data, refresh the workbook.
3. Make any relevant changes and save.
4. Assign the workbook to the relevant work center views to make it public.
   Note that if the workbook has already been assigned and is public, you do not need to assign the workbook again.

Workbook Group

The workbook group provides functions to open and save workbooks and reports. You can also copy, remove, and protect reports and worksheets.

- Open
  Downloads and opens a workbook from the solution system.
- Save
  Saves the workbook back to the solution system as a public workbook. You have the following options to save workbooks to the solution system.
- Save All
  The following options are available
  - Save All
  - Save Workbook
  - Save Plan Data
  - Save Workbook As New
- Switch Workbook Type
  The follow table provides an overview of the workbooks available.

Workbook Type	Description
Personal workbook	A workbook that is adapted to the individual business needs of a user. A personal workbook is only available to the user who creates it. Any change to a personal workbook is saved back to the solution system.
Public workbook	A workbook that can be consumed by all users who have the corresponding work center views assigned. Public workbooks are read-only and can be adapted with personalized views and selections to the business needs of the user. Note that before a created workbook can be made public, administrators must first save the workbook as a design workbook.
Design workbook	A workbook that only includes the layout without data and is only available from the *Business Analytics* work center. Since administrators in general are not allowed to view business data, the data is deleted whenever you store a design workbook. As soon as a design workbook is assigned to a work center view, business users can use it as a public workbook with real data.

- Insert Report
  Inserts a report into the worksheet starting in the active cell.

  > By selecting the *Paging* checkbox, the system displays the first 50 rows of the report including the column headers. Paging down shows the next 50 lines. This is useful if you want to start a report that has large amounts of data.
  > By limiting the number of rows displayed, the system can display the report more quickly. You can still filter or make value selections in order to display the data you want. Note that if you filter or make value selections, the system displays the first page with the specified number of rows.

- Copy Report
  Copies the report and any report views and variable values in order to paste it in a different location.
- Paste Report
  Pastes the report and any report views and variable values that was last cut or copied into the active cell.
- Remove Report
  Removes the report and any report views and variable values in order to paste it in a different location.
- Protect
  Uses the Microsoft Excel function to protect the worksheet to prevent changes to all cells containing data from the solution system.

Refresh Group

Refreshes the data in the report. You can also defer refreshing the report.

- Refresh
  Refreshes the data in the report.
  - Refresh Current Report
    Refreshes the data in the report that is currently selected.
  - Refresh Worksheet When Activated
    If this feature is active for a workbook, any reports on a sheet in the workbook are automatically refreshed when the sheet is activated.
  - Refresh Report
    You can select a report to refresh from the list.
  - Refresh All
- Defer Refresh
  Defers refreshing the report until you refresh it manually. This function is useful, for example, if you make multiple changes to a report, such as to the layout or you add another key figure or column.
- Paging

You can enter the number of rows you want to display. For example, rows 10 to 40. If you click the down arrow, the system displays the next page with 30 rows, including the column headers.

View Group

Displays the report views that are available with a report. You can change the current report view.

In the view pane, you can save changes as a new report view. The view pane also enables you to select the characteristics and key figures that are shown in the report.

- Displaying Characteristics and Hierarchies
  For characteristics and hierarchies, you can specify in which format the individual characteristic values of the characteristic are displayed. You can display characteristics and hierarchies as name, ID, or a combination thereof.
- Sorting
  You can also specify how characteristic values are sorted. You can sort characteristics displayed in rows and columns according to the description or ID in ascending or descending order.
- Results Row
  Using the values from the dropdown list, you can decide how the result is to be displayed. You can decide if results are to be displayed or if results are to be displayed when there are at least two single values.

You can also activate and deactivate conditions that are either delivered with a report or that have been defined for the report or report view in a Web browser. For more information, see Conditions.

Selection Group

You can display the set of value selections for variables that are available with a report. You can change the current set of value selections. In the *Selection* pane, you can save changes as a new set of value selections for variables.

You can also set filter values by selecting values in the report and clicking the Filter icon in the *Selection* group. To remove the filter, click the corresponding icon.

> If you have multiple reports in a workbook and want to apply the same set of value selections, you can use values from dedicated cells.
>
> For example, you have multiple reports that all contain customers. You want to filter the data in the reports to show data related to customer 1001.
>
> On sheet 2, in cell D14, you enter `1001`. In the *Selection* pane of the report, in the Customer variable entry field, you enter `=Sheet2!D14`. After refreshing the report, data is filtered to customers 1001. Alternatively, using Microsoft Excel® functionality, you can define a name for the referenced cell, such as Customer, and enter the name instead of the address of the referenced cell in the Customer variable entry field; in this case, you enter `=Customer`.
>
> Note that this tip does not work for advanced restrictions, such as excluding a value or using intervals.
>
> Also note that data in the workbook is not automatically refreshed if you change the entry in the referenced cell.

Header Group

Enables you to insert a report header.

You can specify if the report name is to be displayed along with technical information about the report. The header can be inserted either as a range of cells above the report or as a text box.

Report Group

Enables you to make further display settings.

- Navigate
  Enables you to navigate to another report or to an overview document.
- Insert Chart
  Enables you to insert a chart using Microsoft Excel functions. For information about Microsoft Excel chart types and functions, see Microsoft Excel documentation.
- Switch Display Mode of Current Report
  - Grid Display
    Displays the report using the solution cell styles in the Microsoft Excel grid.
  - PivotTable Display
    Enables you to display the report as a PivotTable using Microsoft Excel functions. For information about Microsoft Excel PivotTable functions, see Microsoft Excel documentation.
  - Excel Table Display
    Enables you to display the report as a Microsoft Excel table. Note that if you select this display mode, the Microsoft Excel *Design* tab is displayed.
    This display mode is useful, for example, if you want to filter or to sort data using Microsoft Excel functions. For information, see Microsoft Excel documentation.
- Settings
  - Freeze Panes
    Uses the Microsoft Excel freeze pane function to fix the header columns and rows.
  - Format Report
    Formats the report using the default SAP Business solution cell styles as listed under the Microsoft Excel Home tab.
  - Adjust to Complete Column
    Adjusts the width of columns to the width of the longest value in each column.
  - Adjust to Report Result
    Adjusts the column width to the width of the longest value in the column.
  - Use Outline for Hierarchies
    Uses the Microsoft Excel outline function to group characteristic hierarchies by expansion level.
  - Expand Rows to Level
    You can choose the hierarchy level up to which the hierarchy is to be displayed when it is expanded.
  - Merge Repeated Cells
    You can specify whether every instance of a characteristic value is displayed in a row or column.
  - Show Results First
    You can specify how results are to be displayed. You can decide if they are to be displayed above rows or to the left of columns.
  - Arrange As Hierarchy
    The system arranges characteristics in rows and in columns as a hierarchy. The row or column further left serves as the tree structure into which characteristics to the right are inserted.
  - Invert Hierarchies
    The system inverts the hierarchy so that the hierarchy is displayed from bottom to top or from right to left. You can decide to invert a hierarchy in rows and in columns.
  - Suppress Zero Values
    You can suppress columns or rows that contain zeros in your report.
- Show / Hide
  - View
  - Variables

- Planning
- Header
- Messages
  You can specify if all messages or only errors are displayed. You can also decide if messages are displayed on user request.

Assigning Workbooks

Administrators can assign workbooks to work center views, make them available to business users.

For more information, access the *Help Center* from the relevant screen.

Planning Features

The planning features of the add-in tab enables you to create and edit plan data. Cells that are enabled for input have a white background and become yellow when you change their value. Cell that are gray are read-only.

Refresh Group

- Refresh
  Refreshes the data in the plan.
  Depending on the planning application you are using, when you make entries in cells, the changes you make are sent either synchronously or asynchronously.
  - Upload Input (Asynchronous Sending including save)
    When you click *Upload Input*, the changes you make to the plan data are transferred to the system asynchronously, values are calculated, and the data is saved. You may need to wait before you can make further changes to the plan.
    While the system is calculating and saving, the related data in the cells is locked and is read only. Although you can still change values in the sheet, you cannot upload the new values.
    The only option is to refresh the data. If the system has completed the upload when you refresh, the system reads the data again and overwrites all values. In this case, cells are available again for entries. If the calculation is still in progress, a message about the progress of the upload is displayed.
    Note that if you want all read-only cells to be protected against changes, click *Protect* in the *Workbook* group.

    > Tips and Tricks When Uploading Input
    > - When you create a plan, reduce the amount of data to the relevant characteristic value combinations, for example, account and cost center, that are required from a business perspective.
    > - Before changing plan values, restrict the amount of data as much as possible by using selection criteria for characteristic values in the *Selection* pane.
    > - If when changing plan values, the system takes a long time to transfer the data, consider changing less data at one time. For example, you want to change the plan data in 500 cells; change the data of the first 250 cells, upload, and then change the next 250 cells.
    > - If not needed from business perspective, avoid changing rows containing the Not Assigned characteristic value. If the value is required, upload rows containing this value separately from the rest of the data.
    > - If not needed from business perspective, avoid entering data on different aggregation levels, such as subtotals and totals in *Result* rows.

- Send Input (Synchronous Sending excluding Save)
  The changes you make to the plan data are sent to the system synchronously. You can continue to make changes to the plan as soon as the system has finished calculating and is ready for data entry again. Click *Save Plan Data* to save the data in the system.
- Refresh Current Report
  Refreshes the data in the report that is currently selected.
- Refresh Worksheet When Activated
  If this feature is active for a workbook, reports on a sheet in the workbook are automatically refreshed when the sheet is activated.
- Refresh Report
  You can select a report to refresh from the list.
- Refresh All

- Defer Refresh
  Defers refreshing the report until you refresh it manually. This function is useful, for example, if you make multiple changes to a report, such as to the layout or you add another key figure or column.
- Paging
  You can enter the number of rows you want to display. For example, rows 10 to 40. If you click the down arrow, the system displays the next page with 30 rows, including the column headers.

Planning Group

Enables you to plan at different levels and adjust values accordingly.

- Mark Selected
  Marks cells that you select to be sent back to the system. By marking selected cells, you set the value for the cell. The value therefore does not change when you redistribute values by clicking *Refresh*.
- Unmark All
  Unmarks all selected cells.

The following example illustrates how values for sales and target planning can be distributed. Note that the characteristics available for financial planning may differ.

> You want to project revenue for your products and create a plan that contains the characteristics "Product" and "Customer". Each product is sold to several different customers but you only want to see how much money you received for each product. You therefore choose a view that displays the aggregated revenue for your products. Any changes that you make to the product revenue on this aggregated view are distributed down to the individual customers for the relevant product.

The following figures are used to illustrate how the data is distributed.

- The estimated revenue for your Product 1 is USD 1000, for Product 2 USD 2000, and for Product 3 USD 3000. In the system, this information is distributed down to the customer level:

Aggregated view on product level

Sales and Target Planning			
Product	Revenue		
Product 1	1000 USD		
Product 2	2000 USD		
Product 3	3000 USD		
Result	6000 USD		

Distributed down to customer level

Sales and Target Planning			
Product	Customer	Revenue	
Product 1	Customer 1	200 USD	
	Customer 2	200 USD	
	Customer 3	600 USD	
	Result	1000 USD	
Product 2	Customer 1	600 USD	
	Customer 2	600 USD	
	Customer 3	800 USD	
	Result	2000 USD	
Product 3	Customer 1	1000 USD	
	Customer 2	1000 USD	
	Customer 3	1000 USD	
	Result	3000 USD	
Result		6000 USD	

- You then change the value for Product 1 from USD 1000 to USD 3000. The system recalculates the result and again distributes all the values down to customer level in the same proportions:

Aggregated view on product level

Sales and Target Planning			
Product	Revenue		
Product 1	3000 USD		
Product 2	2000 USD		
Product 3	3000 USD		
Result	8000 USD		

Distributed down to customer level

Sales and Target Planning			
Product	Customer	Revenue	
Product 1	Customer 1	600 USD	
	Customer 2	600 USD	
	Customer 3	1800 USD	
	Result	3000 USD	
Product 2	Customer 1	600 USD	
	Customer 2	600 USD	
	Customer 3	800 USD	
	Result	2000 USD	
Product 3	Customer 1	1000 USD	
	Customer 2	1000 USD	
	Customer 3	1000 USD	
	Result	3000 USD	
Result		8000 USD	

- You then double the total revenue. The system distributes this over the three products in the same proportions as at the beginning and also distributes this information down to customer level:

Aggregated view on product level

Sales and Target Planning	
Product	Revenue
Product 1	6000 USD
Product 2	4000 USD
Product 3	6000 USD
Result	16,000 USD

Distributed down to customer level

Sales and Target Planning		
Product	Customer	Revenue
Product 1	Customer 1	1200 USD
	Customer 2	1200 USD
	Customer 3	3600 USD
	Result	6000 USD
Product 2	Customer 1	1200 USD
	Customer 2	1200 USD
	Customer 3	1600 USD
	Result	4000 USD
Product 3	Customer 1	2000 USD
	Customer 2	2000 USD
	Customer 3	2000 USD
	Result	6000 USD
Result		16,000 USD

Note that if you have a value for equal distribution on more than one level of a hierarchy, it may not appear to be distributed equally. The system distributes the value equally on the lowest level. The remainder is then distributed equally on the lowest level before the results are aggregated to the next highest level.

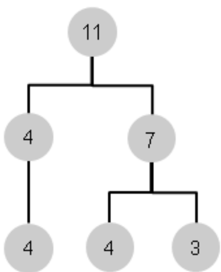
For example, You have 11 items to be distributed equally (without decimal places) on multiple levels in a hierarchy.

The higher level has two nodes; one node has one branch; the other node has two branches. Thus, the lowest level has three nodes.

Equal distribution results in each lowest-level node having the value 3. The remainder is then distributed on the lowest level. This results in two lowest-level nodes having the value 4, and one lowest-level node having the value 3.

Once aggregated to a higher level, one higher-level node has the value 4. The other higher-level node has the value 7.

The result is displayed below.



Further Notes

The functions of the add-in for Microsoft Excel are restricted or not available when using the Microsoft object linking and embedding (OLE) feature. We therefore recommend not using this feature.

11 Copyright and Trademarks

12 Feedback

We welcome your comments about the application help in SAP Cloud for Customer. Send us your feedback!

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